VSE for Clinical Staff User Guide

Version – 1.27

VA
U.S. Department of Veterans Affairs
Office of Information and Technology
Enterprise Program Management Office

Revision History

Date	Revision	Description	Author
12/13/2023	1.27	Updated to add a filter function to Check-In Step column of Daily Appointment List. Reinstated sorting feature to Check-In Time column of Daily Appointment/Daily Workflow Lists.	VSE PMO Booz Allen Hamilton
11/13/2023	1.26	Updated to add filter to columns for Check-In Times on the Daily Appointment/Daily Workflow Lists, and Pre-Check-In and eCheck-In on the Daily Appointment List.	VSE PMO Booz Allen Hamilton
08/28/2023	1.25	Updated to display the Clinic List dropdown in alphabetical order.	VSE PMO Booz Allen Hamilton
07/07/2023	1.24	Updated to implement the ability to provide system notifications to users.	VSE PMO Booz Allen Hamilton
06/13/2023	1.23	Updated the Queue List to include the Memo Column	VSE PMO Booz Allen Hamilton
04/04/2023	1.22	Updated to show eCheck-Ins and Pre-Check-Ins completed count on the Daily Appointment and Daily Workflow Lists. Updated verbiage presented when attempting to delete a queue that still has patients in an incomplete status.	VSE PMO Booz Allen Hamilton
03/20/2023	1.21	Updated document to remove the trash can icon from queuing so users cannot delete a patient from a queue	VSE PMO Booz Allen Hamilton
03/07/2023	1.20	Updated the document to update the phone number field under section 5.6	VSE PMO Booz Allen Hamilton
02/14/2023	1.19	Updated the document with section 5.6 on added messaging	VSE PMO Booz Allen Hamilton
02/07/2023	1.18	Updated the document to revise section 5.4.1.1 and 5.4.1.3 on queues	VSE PMO Booz Allen Hamilton
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01/25/2023	1.16 (not published)	Updated the document with section 5.4 on queues	VSE PMO Booz Allen Hamilton
12/14/2022	1.15	Updated the document with section 5.2.2 Updates Check In and Check Out Status Logic	VSE PMO Booz Allen Hamilton
10/19/2022	1.14	Updated the document with section 5.7 Displays Checkout Time and Indicator.	VSE PMO Booz Allen Hamilton

Date	Revision	Description	Author
09/28/2022	1.13	Added section 6.3 Pop-up Message to Ensures Users are Running Current Version. Updated 6.1 Enhanced Error message section to include the new error message logic.	VSE PMO Booz Allen Hamilton
09/21/2022	1.12	Updated document to include removal of insurance column for MANILA – RO 358.	VSE PMO Booz Allen Hamilton
09/15/2022	1.11	Updated document to include section 5.6 Display Number of Checked-In Appointments and 6.2 Reset Button	VSE PMO Booz Allen Hamilton
09/07/2022	1.10	Updated document to include section 5.1.3 Validating User Access to VistA Instances.	VSE PMO Booz Allen Hamilton
08/30/2022	1.9	Updated document to include the following functionalities: Flag Legend and Toggle to Disable Notifications for Updated Appointments.	VSE PMO Booz Allen Hamilton
08/22/2022	1.8	Updated document to include the following new functionalities: Display Fugitive Felon, Local/National & Restricted Record Flags, and Enhanced Error Messages.	VSE PMO Booz Allen Hamilton
08/10/2022	1.7	Updated Section 5.3 Daily Workflow List to include the Memo functionality.	VSE PMO Booz Allen Hamilton
06/14/2022	1.6	Updated Section 5.4 Medication List and Pre-Visit Summary with Sensitive record pop-up page.	VSE PMO Booz Allen Hamilton
05/12/2022	1.5	Updated the document with Test Patient Screenshots	VSE PMO
03/03/2022	1.4	Accepted all recommended changes and finalized the document	VSE PMO Liberty IT Solutions
03/01/2022	1.3	Updated the document with Medications List, Pre-Visit Summary, and Alert Notifications.	VSE PMO Liberty IT Solutions
02/08/2022	1.2	Final review/proofread and accepted all recommended changes	VSE PMO Liberty IT Solutions
01/28/2022	1.1	Developers Review	VSE PMO Liberty IT Solutions
12/30/2021	1.0	Baseline for VSECS	VSE PMO Liberty IT Solutions

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1 Introduction

The Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Enhancement for Clinical Staff (VSECS) module is a VA-internal web application that allows clinical staff to track patient appointments from check-in, through the clinic workflow, and to a completed appointment.

1.1 Purpose

The Veterans Health Administration (VHA) Office of Integrated Veteran Care (IVC) requested VSE for Clinical Staff, a new web application to improve overall Veteran check-in experience and reduces operating costs for VHA.

1.2 Overview

VSECS is a VA-internal web application that allows staff at VA clinics to manage appointment workflow at a clinic or set of clinics. Users can customize the application to display daily appointments for a specific group of clinics and save multiple personal clinic lists. Users can also view and update appointments by workflow status. Refer to **System Summary** for a more detailed description of VSE for Clinical Staff functionality.

1.3 Disclaimers

1.3.1 Software Disclaimers

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1.4 Project References

1.4.1 Information

The VSECS points of contact (POCs) include:

- OIT ESE - Scheduling Support

» IVC – I&T PCI Technical POCs – Redacted

» Scheduling Technical Director – Redacted

» IVC - Innovation and Technology Division Business/Product Owner/Director – Redacted

» IVC - Innovation and Technology Division Program Manager – Redacted

» IVC - Innovation and Technology PCI Subject Matter Expert (SME) – Redacted

VSECS Resources

» VA Software Document Library (VDL) – VA Software Document Library (VDL)

1.4.2 Help Desk

Refer to Section 6 for additional information.

2 System Summary

VSE for Clinic Staff is a web-based, cloud-hosted application that assists with accessing and managing appointment workflow at a clinic or set of clinics. It consists of three primary functions: Daily Appointment List, Daily Workflow List, and Clinic List Management. The Daily Appointment List tracks appointments for all the clinics available under the Clinic List. The Daily Workflow List shows the current workflow status a patient is in and allows the user to track and change the status of the workflow. The Clinic List Management allows clinicians to group clinics into one manageable list.

3 User Access Levels

VSE for Clinical Staff is accessible to any VA network user who has a Personal Identity Verification (PIV) card and Identity and Access Management (IAM) account provisioned to a VistA station.

- Schedulers are required to have the SDECRPC Menu Option. All scheduling personnel should already have the menu option.
- Non-Schedulers, Nurses, and Providers are required to have SDECRPC Menu Option and SDECVIEW Key.
- Users needing access to the Queue Management tab must have SD SUPERVISOR Key assigned to them.
- Users must have SECONDARY MENU OPTIONS: VIAB WEB SERVICES OPTION to utilize patient search for queuing.

4 Getting Started

To access the VSE for Clinical Staff application, the user follows these initial process steps:

4.1 Logging into VSE for Clinical Staff

1. To access VSECS, open either the Chrome or Edge browser and copy this hyperlink (Redacted) into the address bar.

2. A Login window displays; click “sign in with VA PIV Card” to sign in using your PIV.

Figure 1: Single Sign-On Internal (SSOi) Login.

3. If login validation is successful, the VSE for Clinical Staff home page will be displayed.

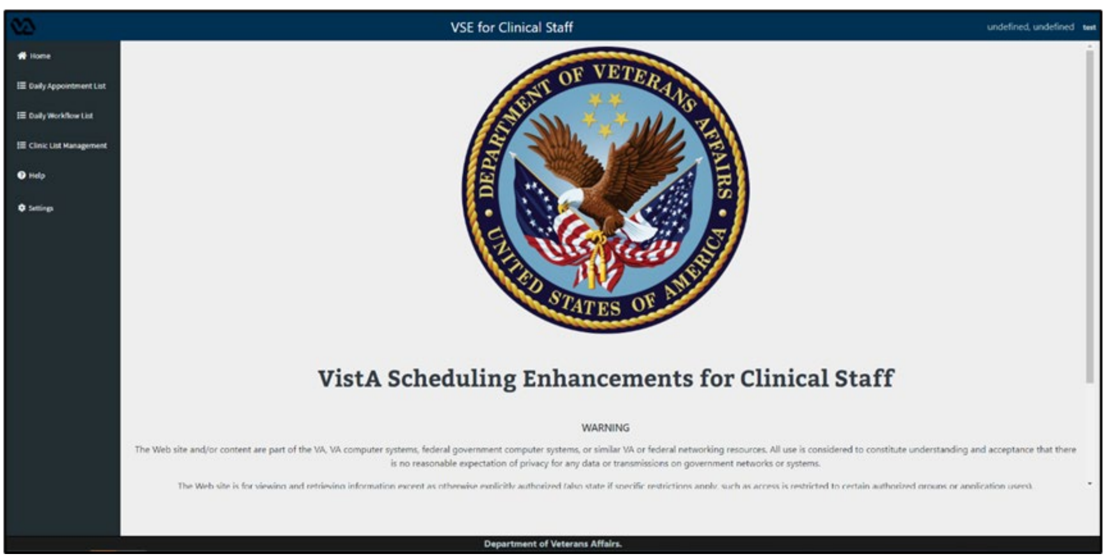


Figure 2: VSECS Home Page.

5 Using the Application

This section describes VSECS functions inside the Daily appointment list, Daily workflow list, and Clinic list management, and how to use these tools to create, edit, view, and track patient workflow status.

5.1 Clinic List Management

5.1.1 Create New Clinic List

Creating a Clinic List allows the clinicians to group clinics into one manageable list. The Clinic List dropdown will display in alphabetical order, with the default Clinic List at the top. If you have not created a Clinic List, the appointment list view and Workflow List will not be accessible. After successfully logging into VSECS, follow the steps below to create a new Clinic List:

1. From the VSECS home page left navigation, click on Clinic List Management. If you have not created a Clinic List before it will redirect you to the Create Clinic List page, **Figure 4: Create a Clinic List**, to create a Clinic List. If you have created a Clinic List before, the Clinic List Management page displays with the list of Clinics as shown on **Figure 3: Clinic List Management**.

2. From the Clinic List Management page, click on Create New Clinic List and the Create Clinic List page will be displayed as shown on **Figure 4: Create a Clinic List**.

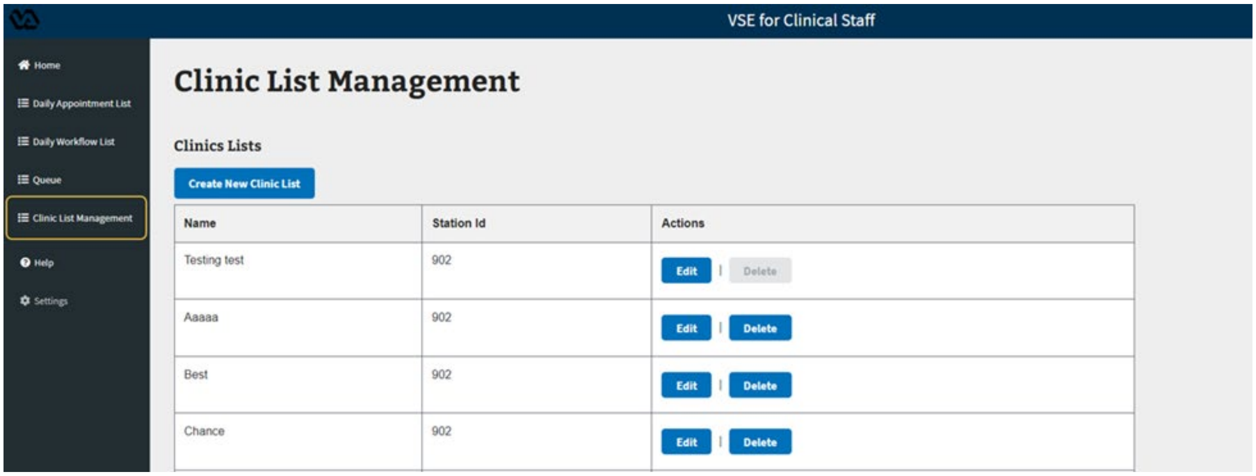


Figure 3: Clinic List Management.

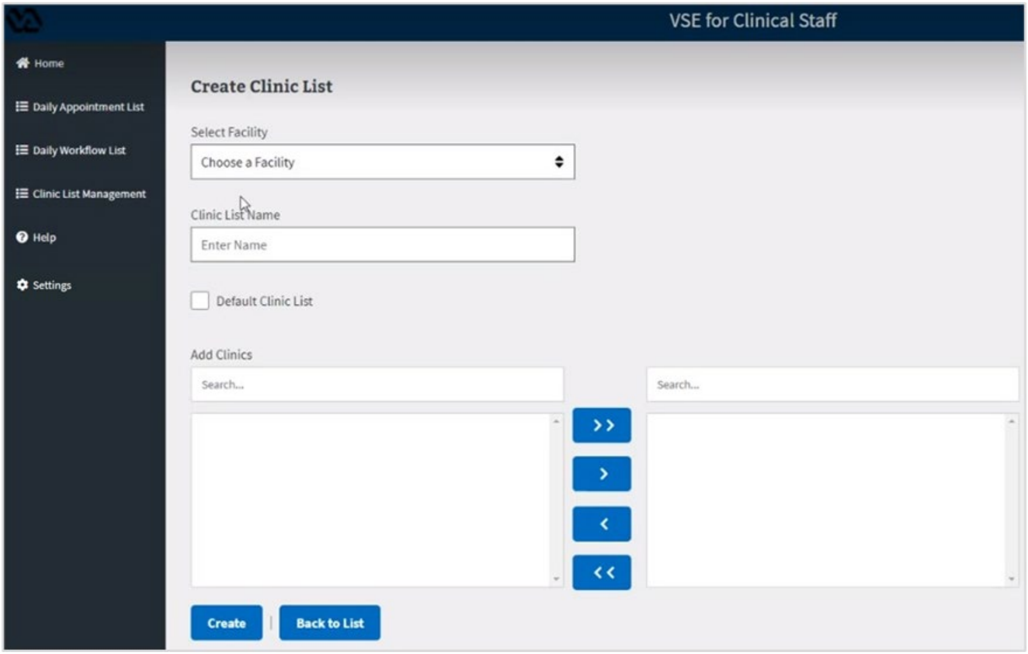


Figure 4: Create a Clinic List.

3. On the Create Clinic List Page:

   a. From the top, click on the Select Facility drop-down menu to choose a facility. The clinics under that facility will be populated inside the Add Clinics multi-text box on the bottom left corner.

Figure 5: Create Clinic List: Choosing a Facility.

b. Enter a name for your Clinic List. If this is your first time creating a Clinic List, it will automatically become the default Clinic List. Select the Default Clinic List check box to set the new Clinic List as your default Clinic List. Note: There can only be one Default Clinic List.

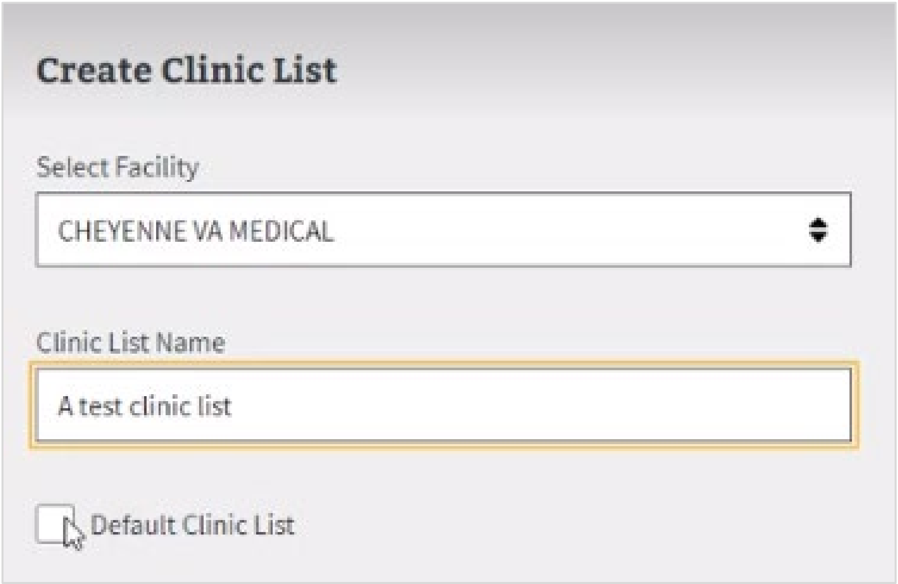


Figure 6: Create Clinic List: Setting a Clinic List as Default.

c. Type in the search bar to narrow down the Clinic List as shown below.

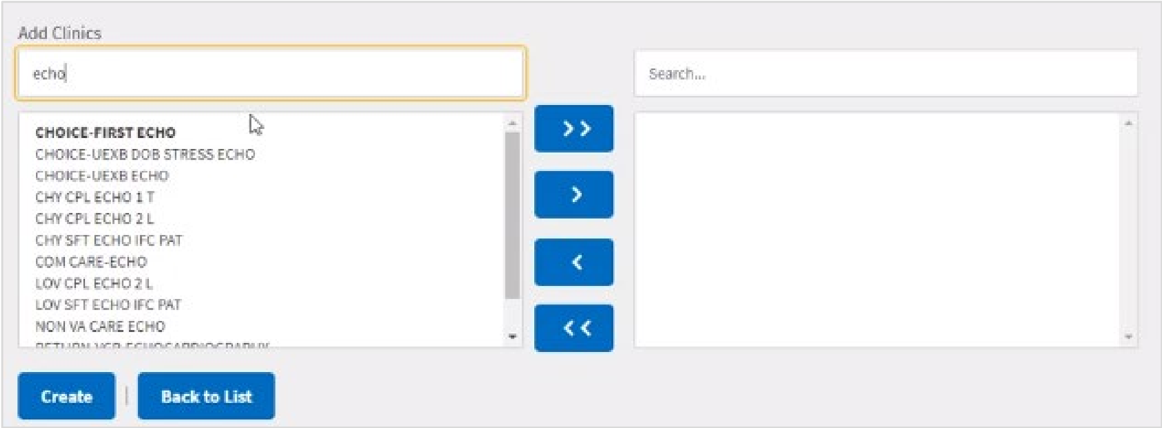


Figure 7: Create Clinic List: Searching for Clinics.

d. The final step before creating the list is to add the clinics to your list. Select the list of clinics from left side and use the buttons to move the selection or everything across to the right. You can only add up to 50 clinics to your new list. Finally, click on the Create button to create the new Clinic List.

Button	Description
>>	Adds all the clinics on the left to the right side of the Clinic List.
>	Adds selected clinics on the left to the right side of the Clinic List.
<	Removes selected clinics from the right side of the Clinic List to the left.
<<	Removes all clinics from the right side of the Clinic List to the left.

Figure 8: Create Clinic List Actions.

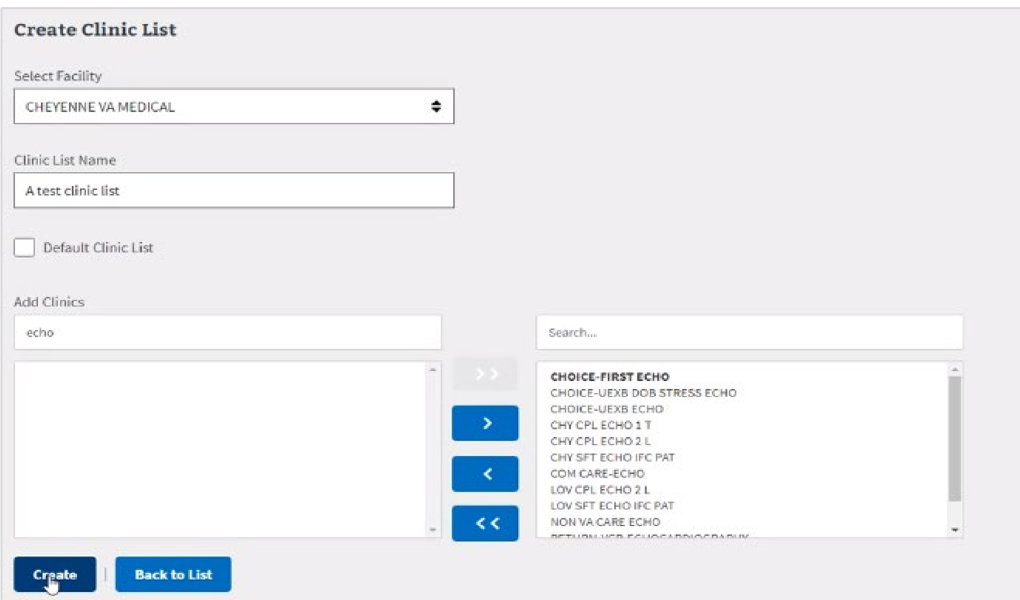


Figure 9: Create Clinic List: Adding Clinics to the New Clinic List.

5.1.2 Edit/Delete Personal Clinic List

Once a Clinic List has been created, it can be edited by adding or removing clinics from the List.

To edit a personal Clinic List:

1. Navigate to the Clinic List Management Page to see a list of personal Clinic Lists.

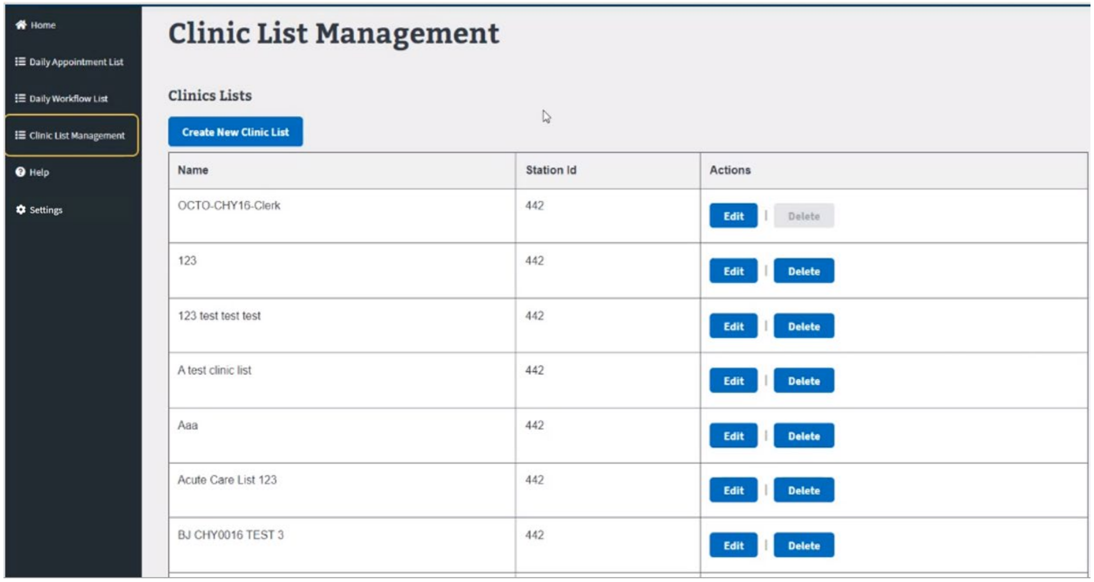


Figure 10: Clinic List Management Page.

2. Click the Edit button of the personal Clinic List you want to edit to display the Edit Clinic List Page. After making the changes, click the Save List button to save the changes to the personal Clinic List. Click the Back to List button to exit the Edit Clinic Page without making any changes to the Facility or Clinic Name of the list. **NOTE:** When moving the clinics from the left to the right side of the Clinic List it automatically saves the changes.

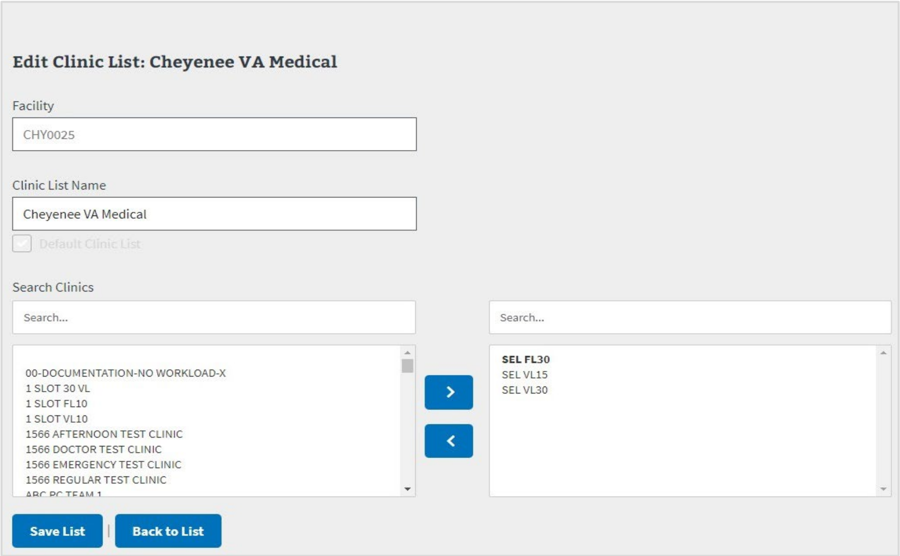


Figure 11: Editing a Clinic List.

3. To delete a Clinic List, from the Clinic List Management Page, click the Delete button of a personal Clinic List. The Delete Clinic List Page displays asking if you want to delete the list. Click either the Delete List button or the Back To List button to cancel the action. **NOTE:** Your default personal Clinic List can't be deleted; the Delete button is always disabled for that list.

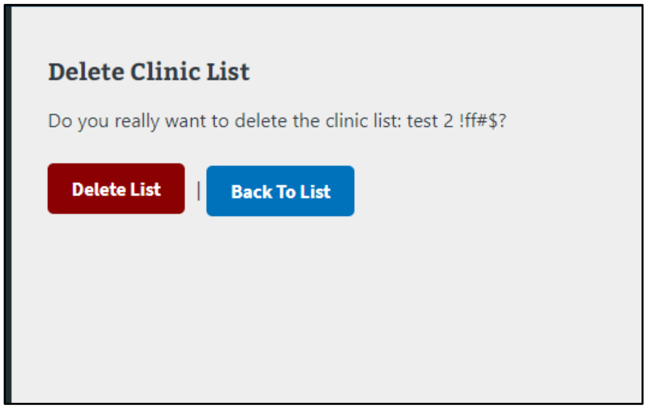


Figure 12: Delete a Clinic List.

5.1.3 Validating User Access to VistA Instances

VSECS will validate a user's clinic list access upon app load. Clinics that the user no longer has access to will be removed from the dropdown on the Daily Appointment List and Daily Workflow List. Additionally, the clinics the user no longer has access to will only be able to be deleted within the Clinic List Management page to indicate the user no longer has access to that clinic as shown below.

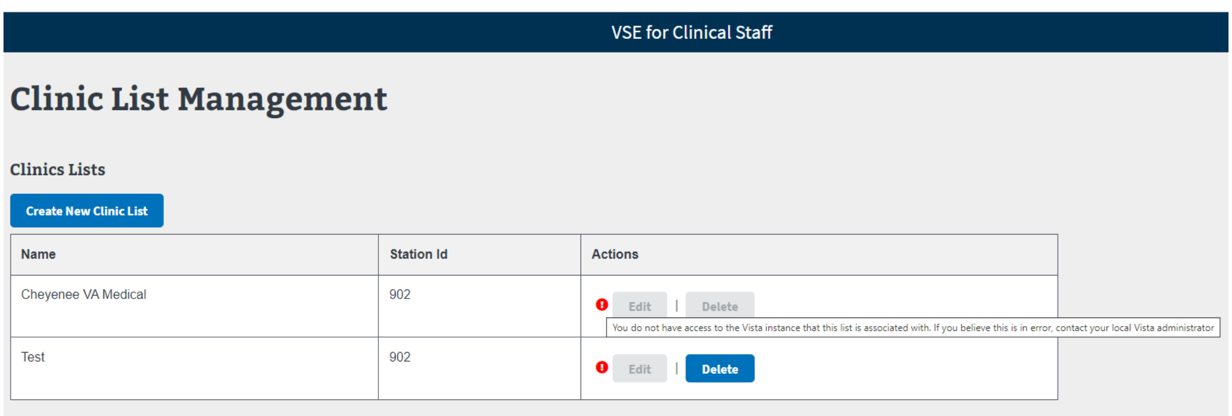


Figure 13: Example of a User with No Access to the Clinic List.

5.2 Daily Appointment List

Once the clinic list is created, it will show up in the Daily Appointment List for the clinical staff to view and track.

5.2.1 Sorting and Filtering

The Daily Appointment List displays all the appointments for that day for all the clinics you have under the Clinic List. It tracks patient attributes like Current Pre Check-In Step, Pre-Check-In status, E-Check-In status, Demographics, and Insurance indicators.

Use the drop down button to select a different Clinic List to see the clinics and appointments under those clinics. The up and down arrows next to the column headers allow you to sort based on the type of column.

Note: The insurance column on the Daily Appointment List will not show for MANILA-RO Station ID 358.

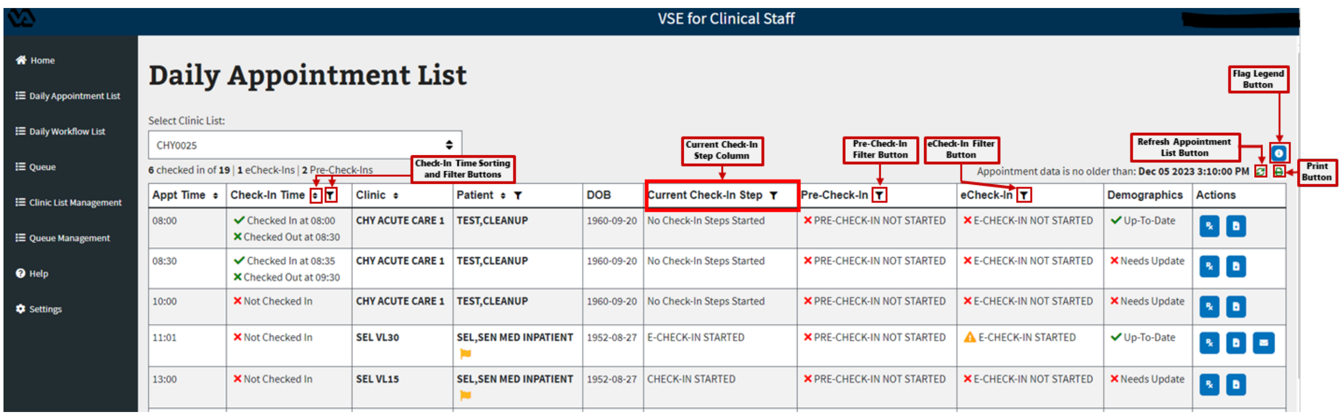


Figure 14: Daily Appointment List.

5.2.2 Check-In Time Filter

The Check-In Time column of the Daily Appointment List and Daily Workflow List has been updated to allow users to filter and sort.

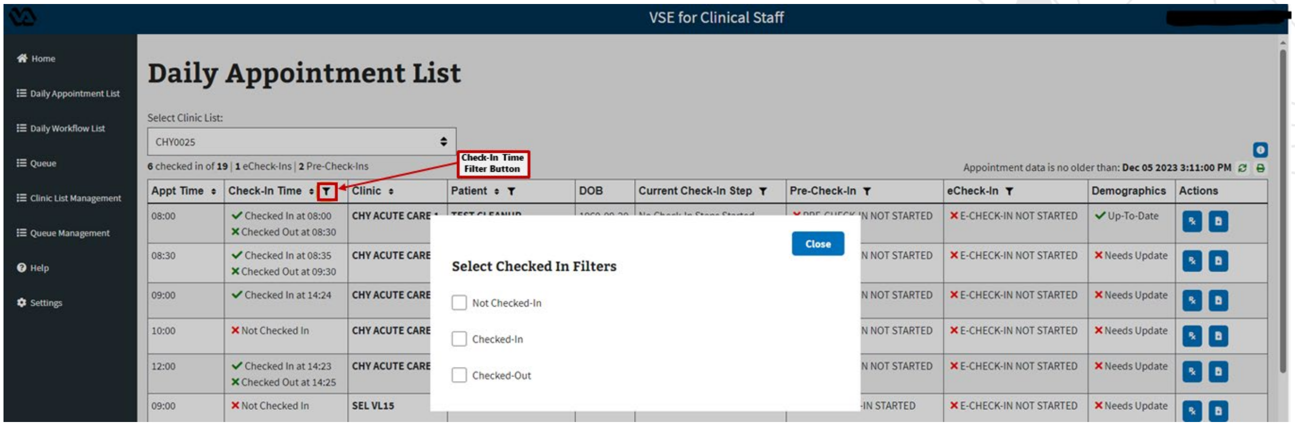


Figure 15: Check-In Time column with the filter button engaged on the Daily Appointment List.

5.2.3 Filtering of Current Check-In Step Column

The Current Check-In Step column of the Daily Appointment List now allows users to filter patients by their check in step.

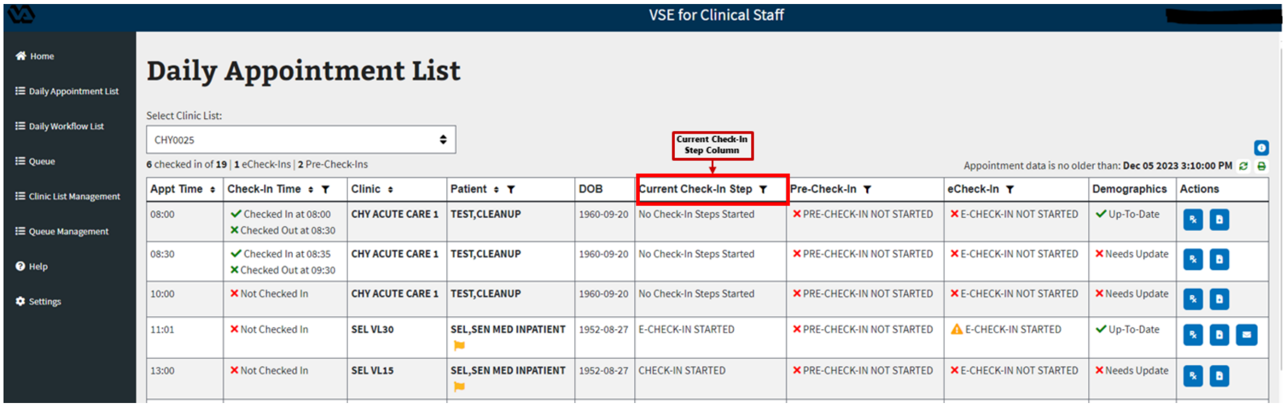


Figure 16: Current Check-In Step Column on Daily Appointment List.

5.2.4 Pre-Check-In Filter

The Pre-Check-In column of the Daily Appointment List includes a filter to allow users to filter patients by their pre-check-in status.

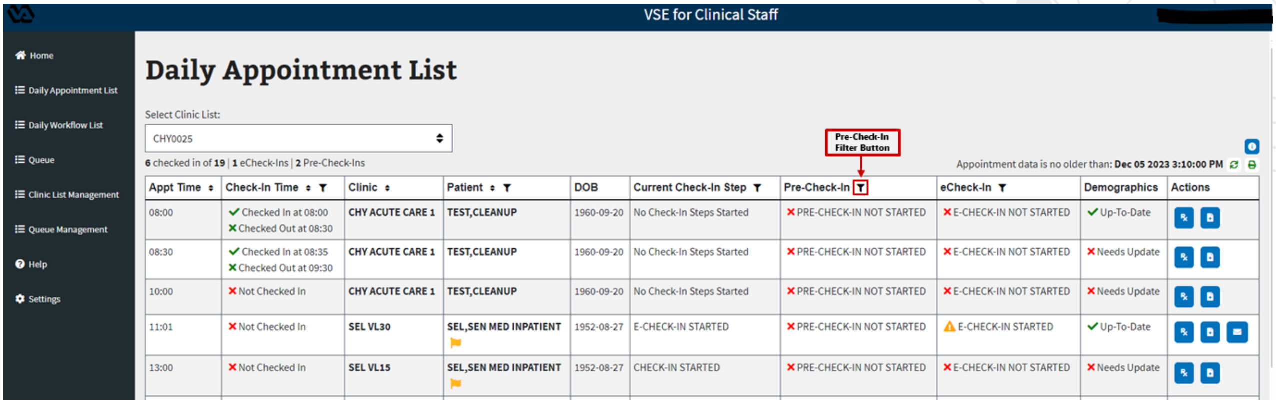


Figure 17: Pre-Check-In filter button on the Daily Appointment List.

5.2.5 eCheck-In Filter

The eCheck-In column of the Daily Appointment List also includes a filter to allow users to filter patients by their echeck-in status.

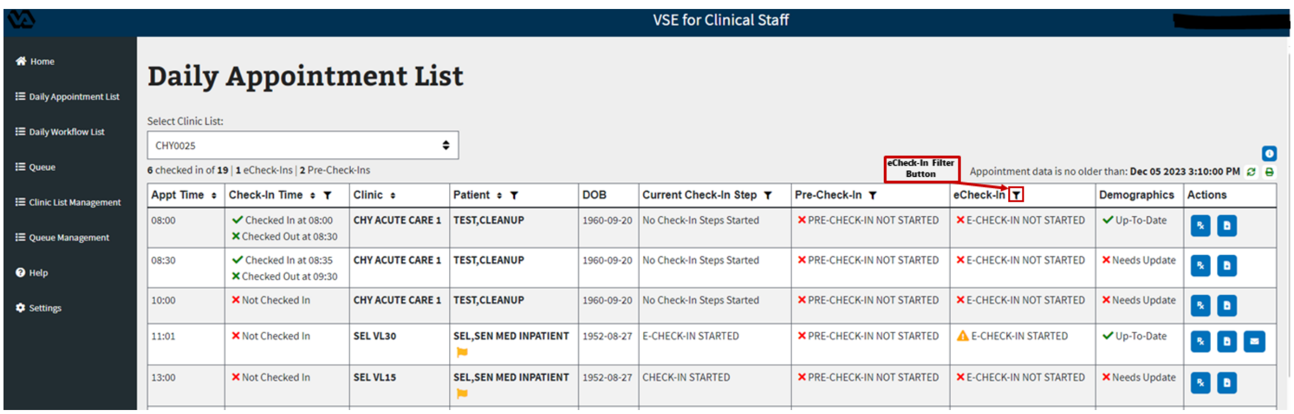


Figure 18: eCheck-In filter button on the Daily Appointment List.

5.2.6 Printing the Daily Appointment List

To print your Daily Appointment List, click the Print button on the right corner of the Daily Appointment List table and you will be able to save the Daily Appointment List in PDF format.

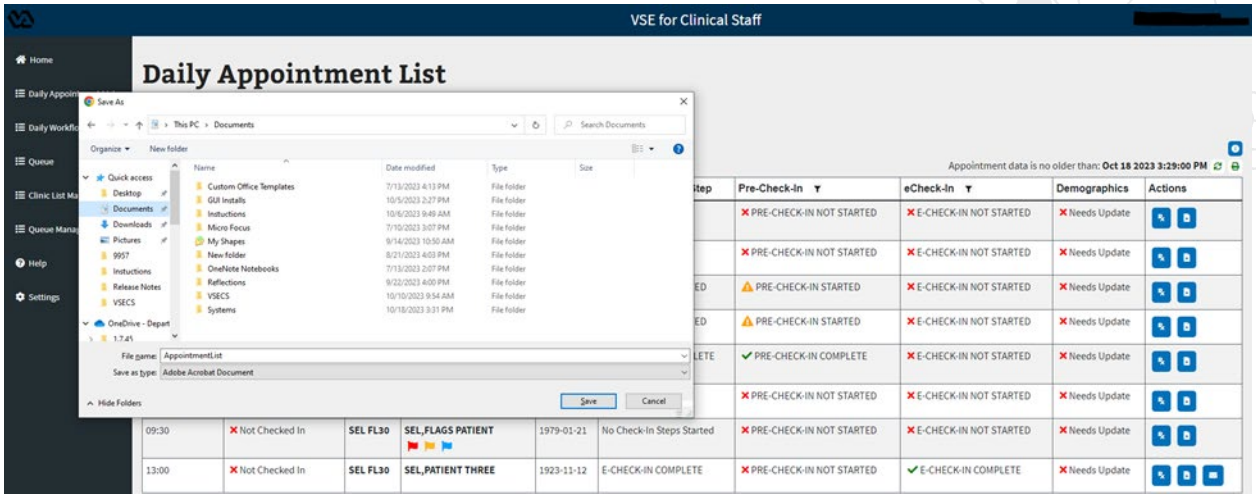


Figure 19: *Printing the Daily Appointment List in PDF Format.*

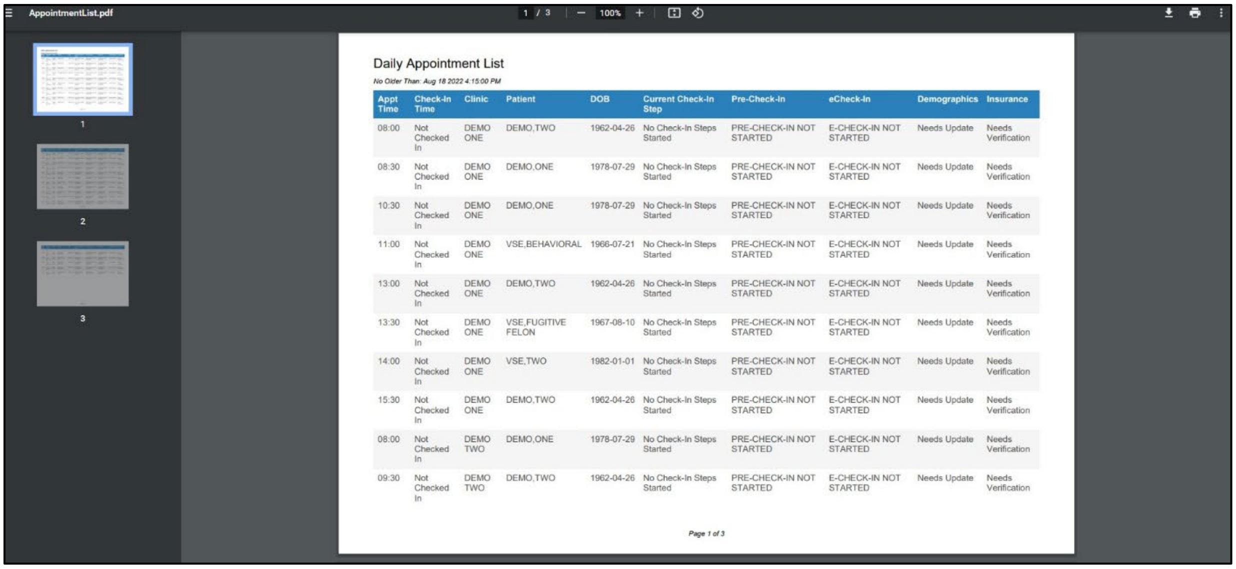
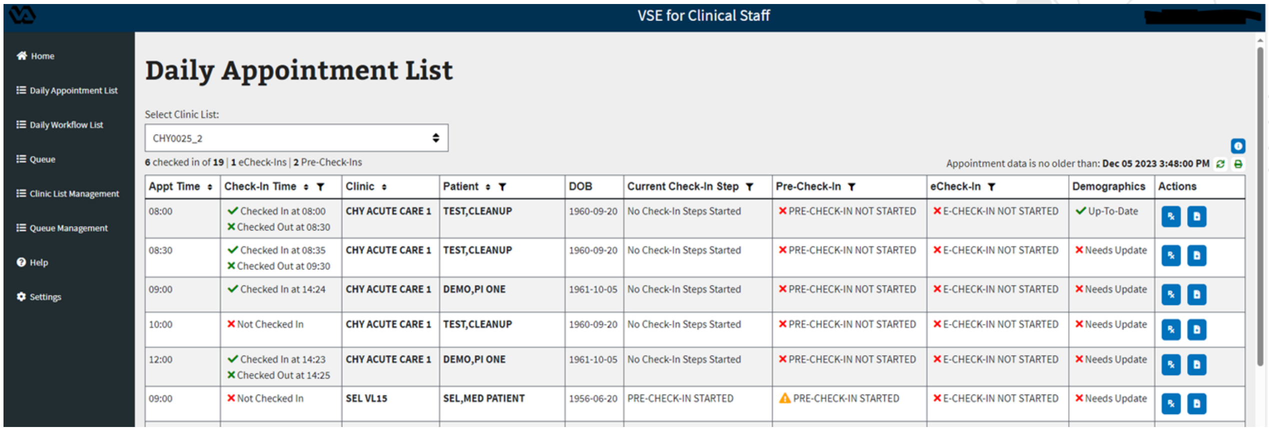


Figure 20: *Printed PDF Format of the Daily Appointment List.*

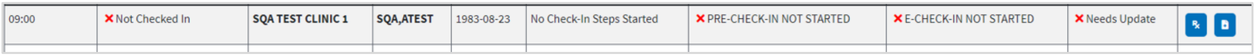
5.2.7 Updates Check In and Check Out Status Logic

The Daily Appointment List and Daily Workflow List will show if an appointment has been checked in and if an appointment has been fully checked out. Appointments that were checked in and checked out will display both statuses and times.



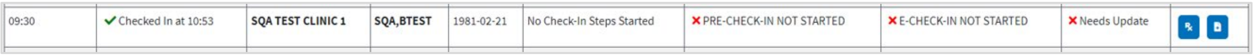
Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Step	Pre-Check-In	eCheck-In	Demographics	Actions
08:00	Checked In at 08:00 Checked Out at 08:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Up-To-Date	
08:30	Checked In at 08:35 Checked Out at 09:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	
09:00	Checked In at 14:24	CHY ACUTE CARE 1	DEMO,PI ONE	1961-10-05	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	
10:00	Not Checked In	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	
12:00	Checked In at 14:23 Checked Out at 14:25	CHY ACUTE CARE 1	DEMO,PI ONE	1961-10-05	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	
09:00	Not Checked In	SEL VL15	SEL,MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	PRE-CHECK-IN STARTED	E-CHECK-IN NOT STARTED	Needs Update	

Figure 21: Daily Appointment List with the new Check In and Check Out Logic.



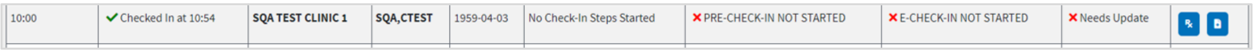
09:00	Not Checked In	SQA TEST CLINIC 1	SQA,ATEST	1983-08-23	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	

Figure 22: Not Checked In.



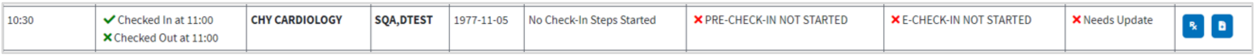
09:30	Checked In at 10:53	SQA TEST CLINIC 1	SQA,BTEST	1981-02-21	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	

Figure 23: Checked In but not Checked Out.



10:00	Checked In at 10:54	SQA TEST CLINIC 1	SQA,CTEST	1959-04-03	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	

Figure 24: Checked Out with Act Req.



10:30	Checked In at 11:00 Checked Out at 11:00	CHY CARDIOLOGY	SQA,DTEST	1977-11-05	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	

Figure 25: Completely Checked Out.

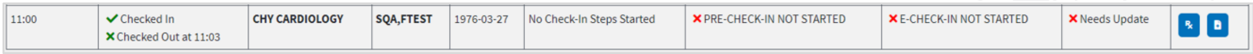


Figure 26: Completely checked out but never Checked In.

5.3 Daily Workflow List

The Daily Workflow List Page shows a patient's current workflow status and allows you to track and change the status of the workflow.

5.3.1 Change a Workflow Status

To change a patient's workflow status, from the Workflow Status column, click the drop-down arrow and select the new step. A pop-up page displays asking to confirm the changes. Click Accept and the workflow status will be updated.

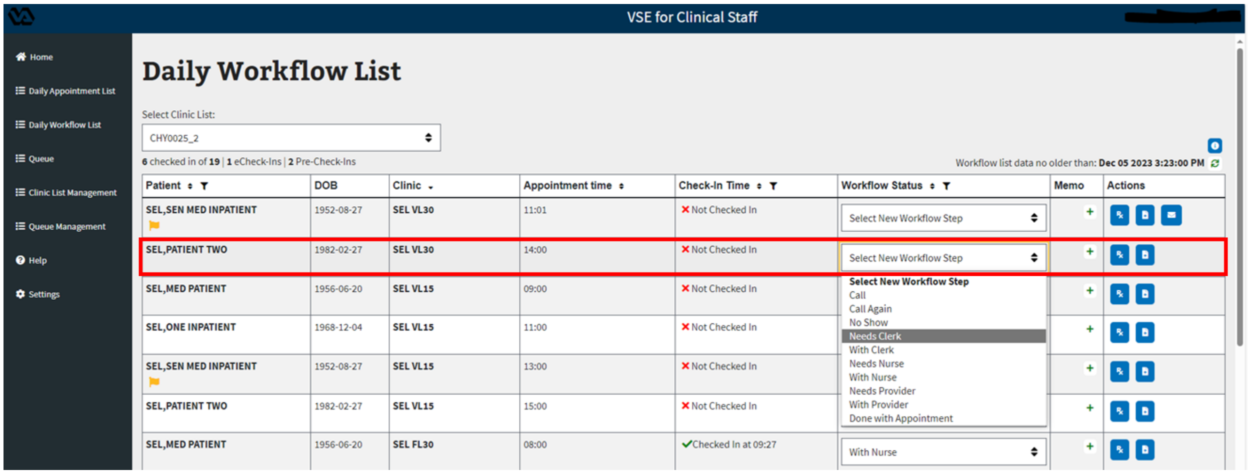


Figure 27: Daily Workflow List – Select New Workflow Step.

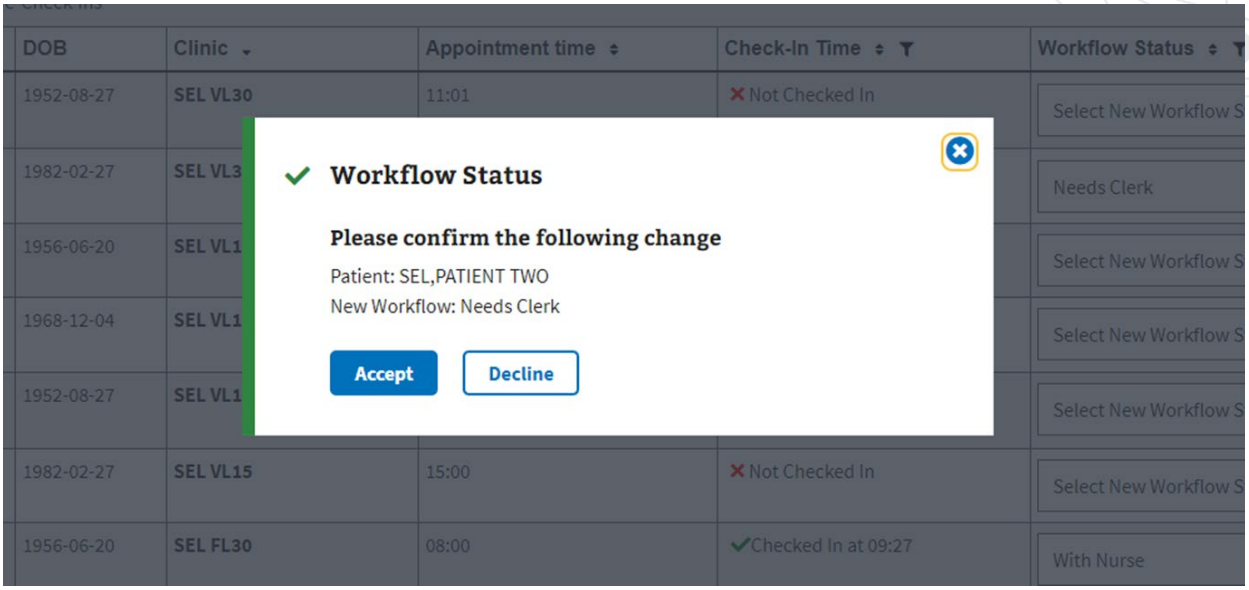


Figure 28: Confirming a Workflow Status Change to “Needs Clerk.”

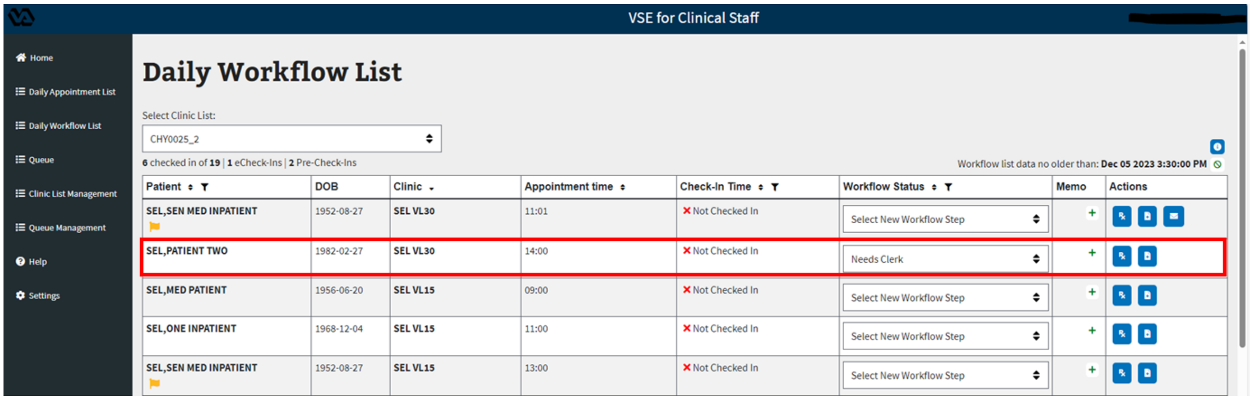


Figure 29: Daily Workflow List – New Workflow Status “Needs Clerk.”

5.3.2 Sorting and Filtering

Appointments can be sorted based on Patient Name, Clinic, Appointment Time, Check-In Time, and Workflow Status. Sorting is done by simply clicking the up and down arrows or the filter icon next to the column headers.

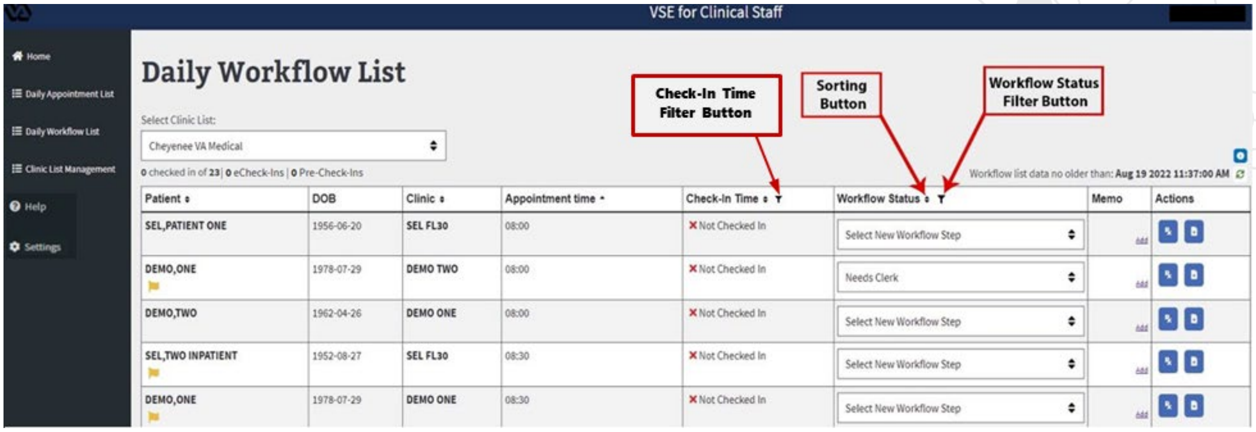


Figure 30: Sorting and Filtering a Daily Workflow List.

Records can be filtered based on the current workflow status. Click the Workflow Status Filter button, which appears on the right side of Workflow Status column, to display the workflow Filter modal window. From the modal window users can filter their work list by workflow status through selecting the check boxes next to the workflow statuses.

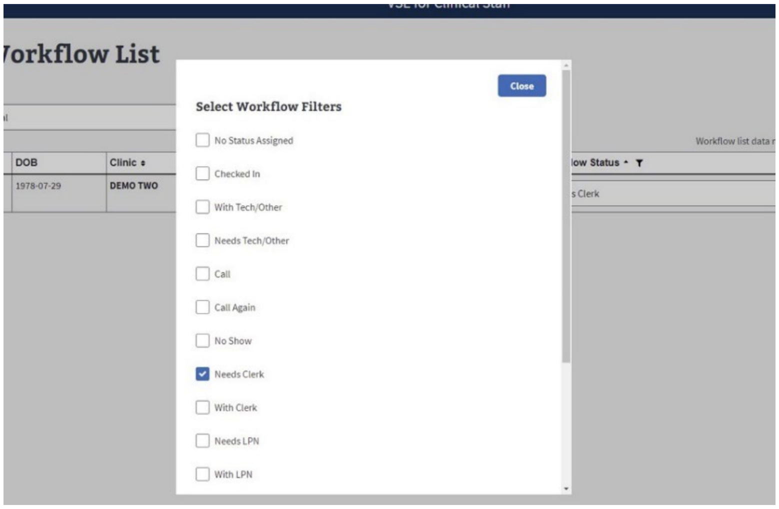


Figure 31: Filter Workflow Status.

The Check-In Time column of the Daily Workflow List has been updated to allow users to filter.

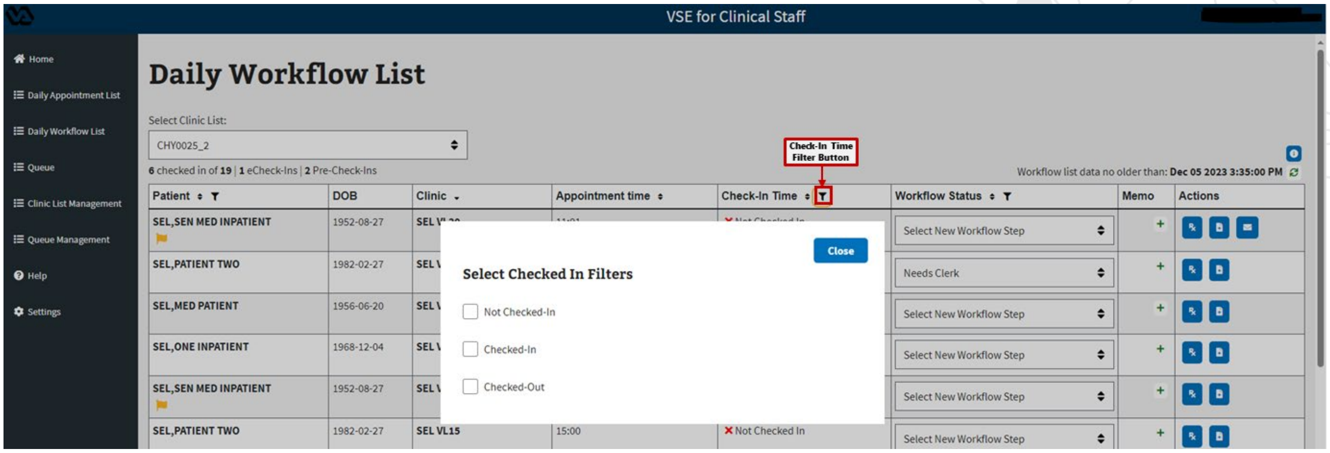


Figure 32: Check-In Time Filter Engaged Showing a Pop-Up Box on a Daily Workflow List.

5.3.3 Alert Notifications

Whenever a change to the Daily Workflow List occurs, an alert notification will be displayed on the taskbar. Even if the VSECS application is in the background, the alert notification still pops-up on the task bar informing the staff of the changes. Changes that trigger an alert include a new appointment in the list or workflow status change.

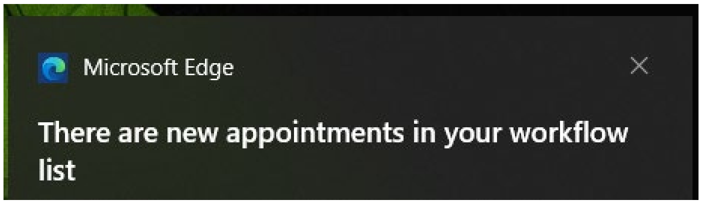


Figure 33: VSECS Alert Notification.

Similarly, if anything changes on the Daily Workflow List the affected row will be highlighted.

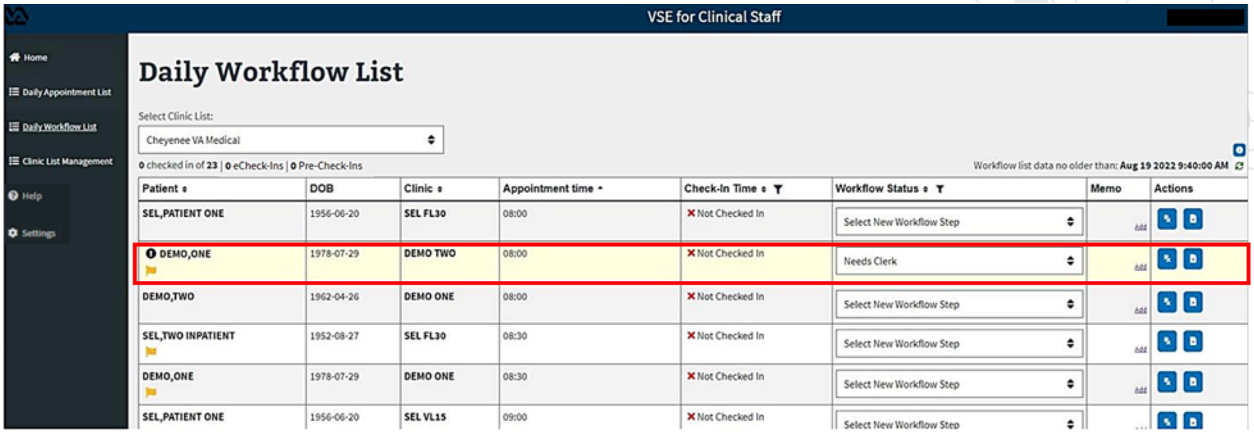


Figure 34: Patient on the Second Row is Highlighted to Notify the User there was a Recent Change to the Record.

5.3.3.1 Disable Notifications for Updated Appointments

The below toggle has been added to the Settings page to let users disable all Windows notifications and alerts for updated appointments.

Figure 35: Disable Window Alert/Notifications on Setting page.

5.3.4 Memo Column

5.3.4.1 Adding a Memo

Users can add a memo to a specific appointment by selecting "Add" under the Memo column for that appointment.

Figure 36: Memo Column.

A pop-up will appear for the Memo to be entered. The user can type in a memo and select "Add Memo."

Note: There is a 100-character max for memos.

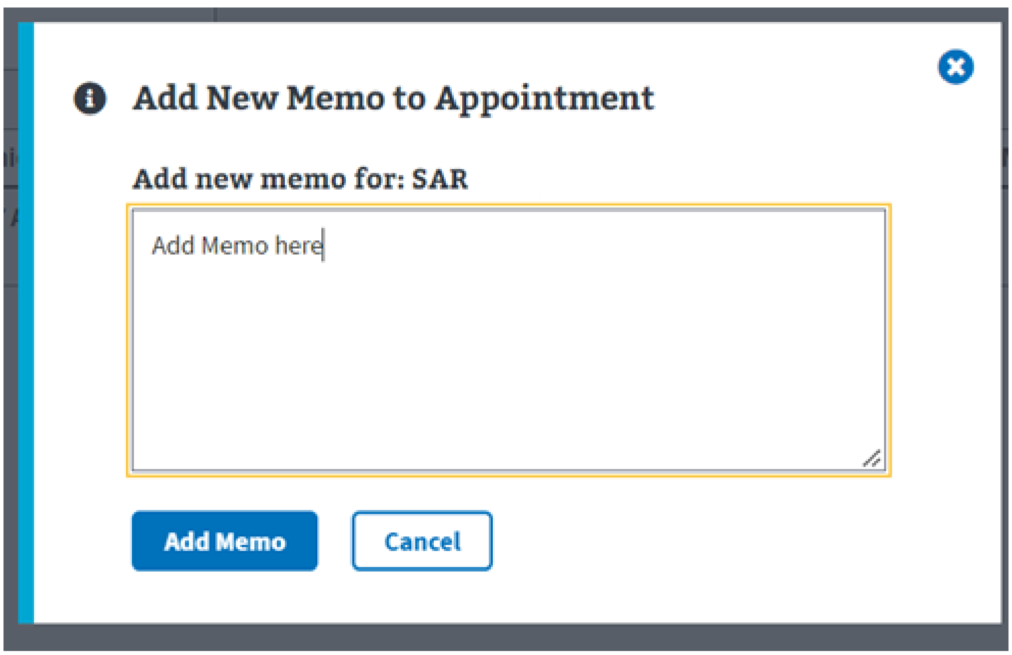


Figure 37: Adding the New Memo to the Appointment.

The Memo will show up in the Memo column of the related appointment with a timestamp and the initials of the user that entered the memo.

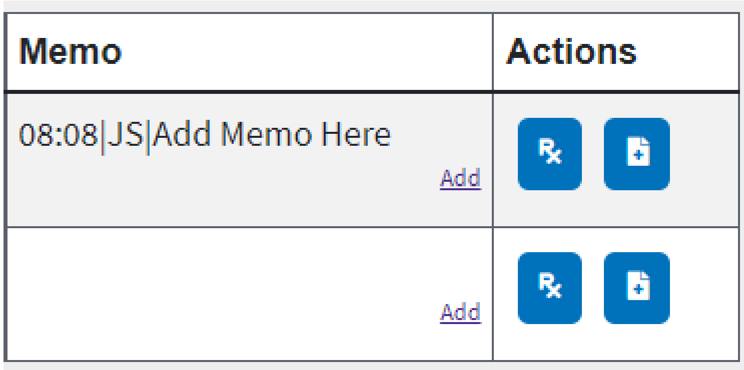


Figure 38: The New Memo will Show Under the 'Memo" Column.

5.3.4.2 Adding Multiple Memos to an Appointment

Multiple memos can be added to the appointment. A user can repeat the process to add an additional memo. When there is more than one memo on an appointment, a new option will appear in the column named "More." Only the most recent memo will show on the Daily Workflow list.

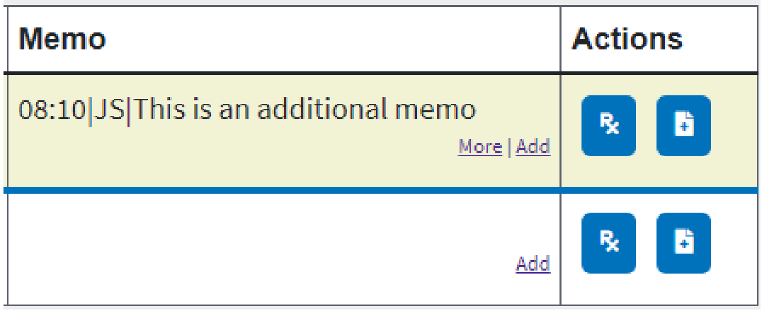


Figure 39: Additional Memos Can be Added by Clicking the "Add" Button.

If a user selects more, a pop-up will appear to show all memos for that appointment.

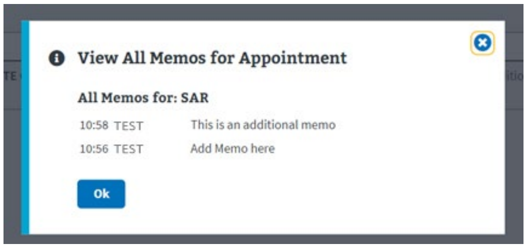


Figure 40: Click the "More" Button Under the Memo Colum to View all the Memos for the Appointment.

5.4 Queues

VSE for Clinical Staff Queuing functionality allows users to add Veterans to a queue regardless of if they are in the VA system and where they do not have an appointment, so they can request services based on their arrival time.

5.4.1 Queue Management

Users that have SD SUPERVISOR Key assigned to them will have the Queue Management tab within VSECS. Select Queue Management to create a queue.

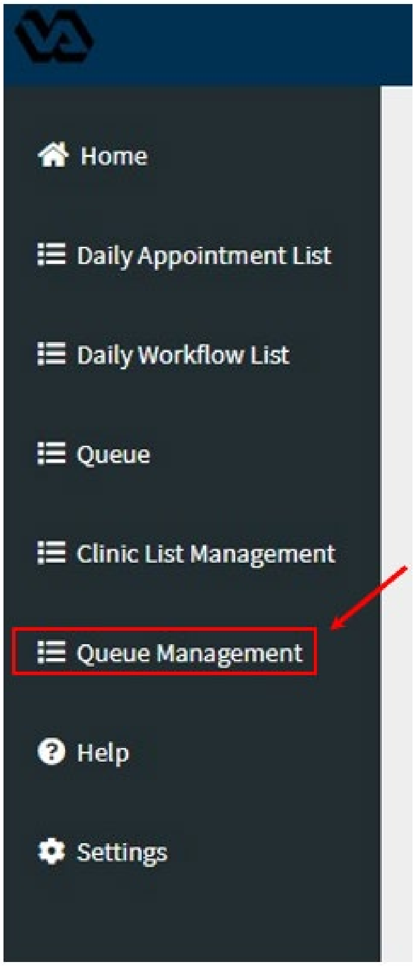


Figure 41: Queue Management Tab.

From the Queue Management page, a user with SD SUPERVISOR Key can create queues, or view, edit and delete existing queues.

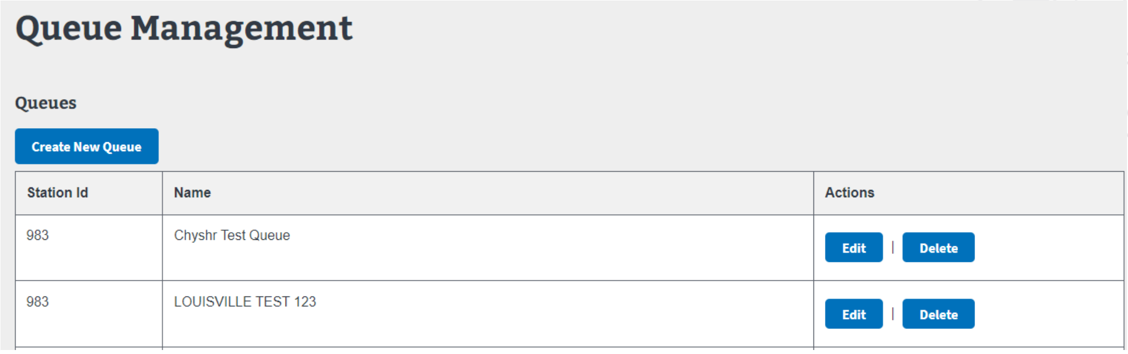


Figure 42: Queue Management Page.

5.4.1.1 Creating Queues

- Select “Create New Queue” on the Queue Management page.
- From the dropdown, select the applicable facility.
- Type in a name for the queue.
- Select “Create.”

Note: Queue names must be greater than 3 characters, but less than 50.

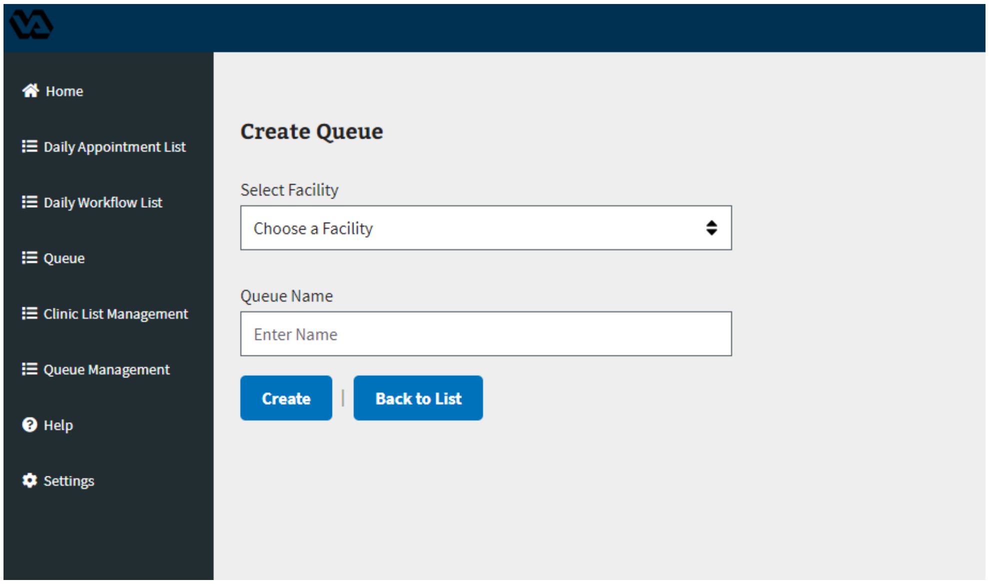


Figure 43: Create Queue Page.

Note: Users will be unable to create a duplicate queue from the Queue Management tab. If a user attempts to create a Queue with the same name as another they will see the below message.

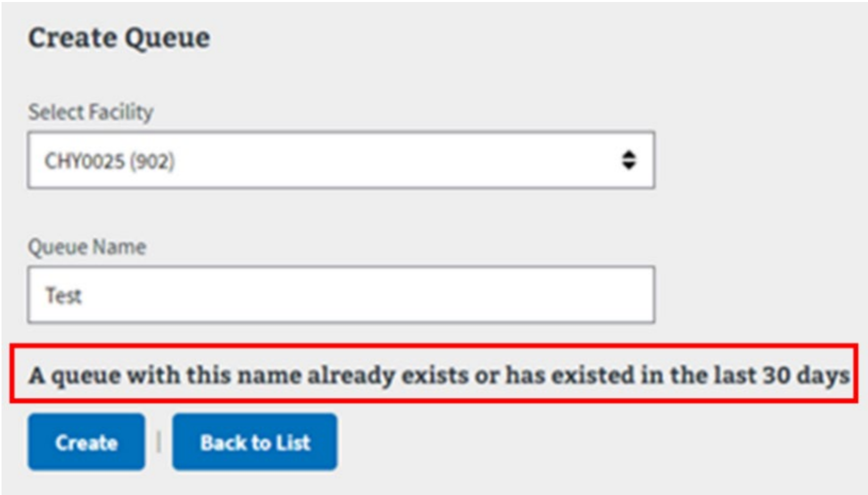


Figure 44: Unable to Create a Duplicate Message.

5.4.1.2 Editing Queues

- Select “Edit” under the Actions column of the queue.

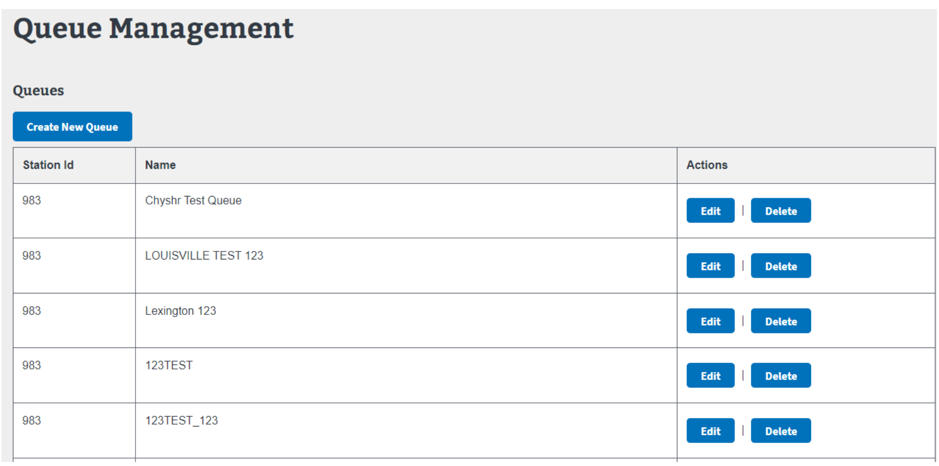


Figure 45: Editing Queue Management.

- Update the Queue Name as desired.
- Select “Update.”

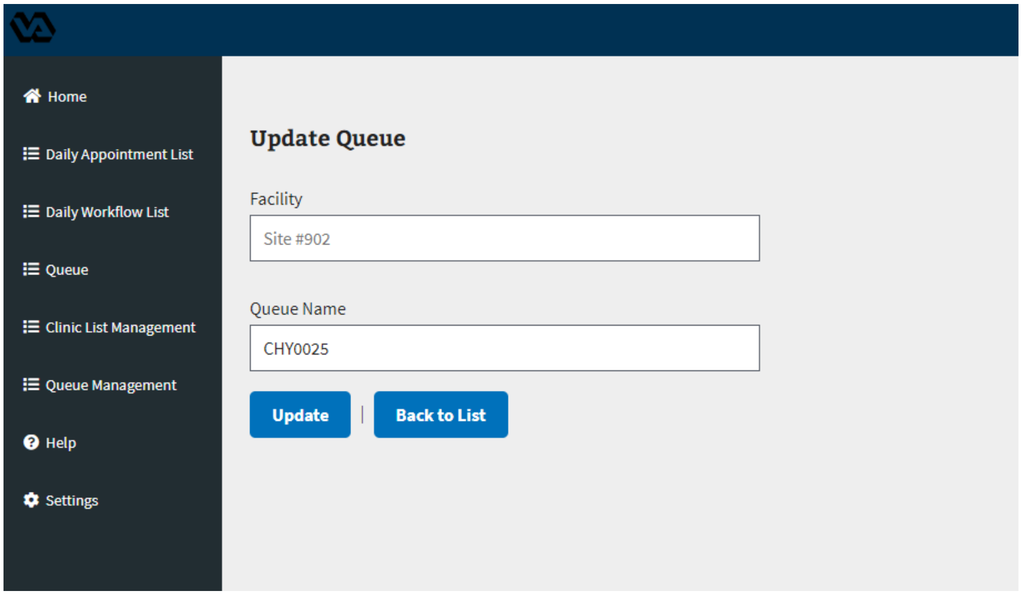


Figure 46: Update Queue Page.

5.4.1.3 Deleting Queues

- Select "Delete" under the Actions column of the queue.

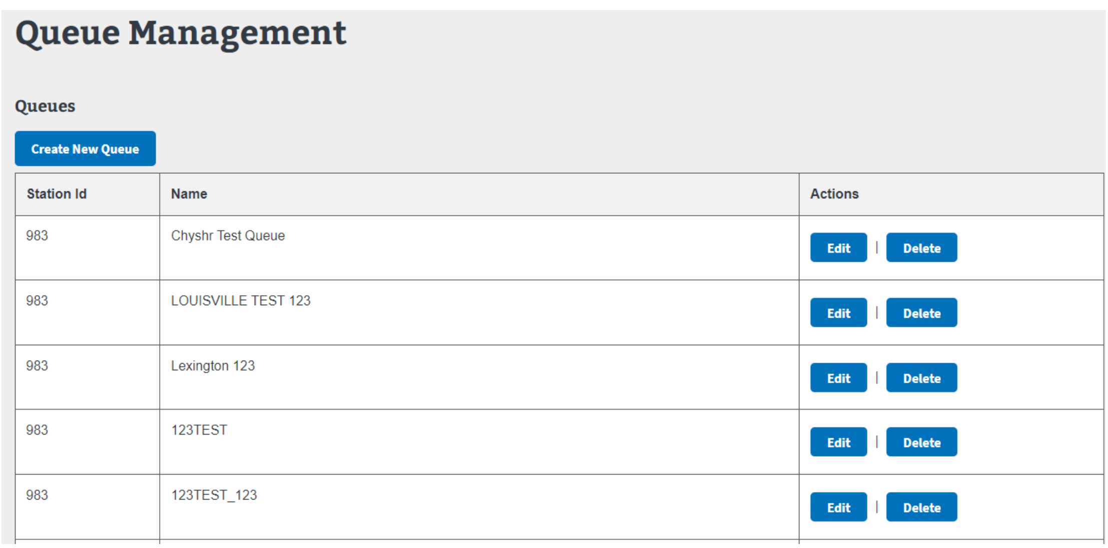


Figure 47: Deleting Queue Management.

- Select "Delete Queue."

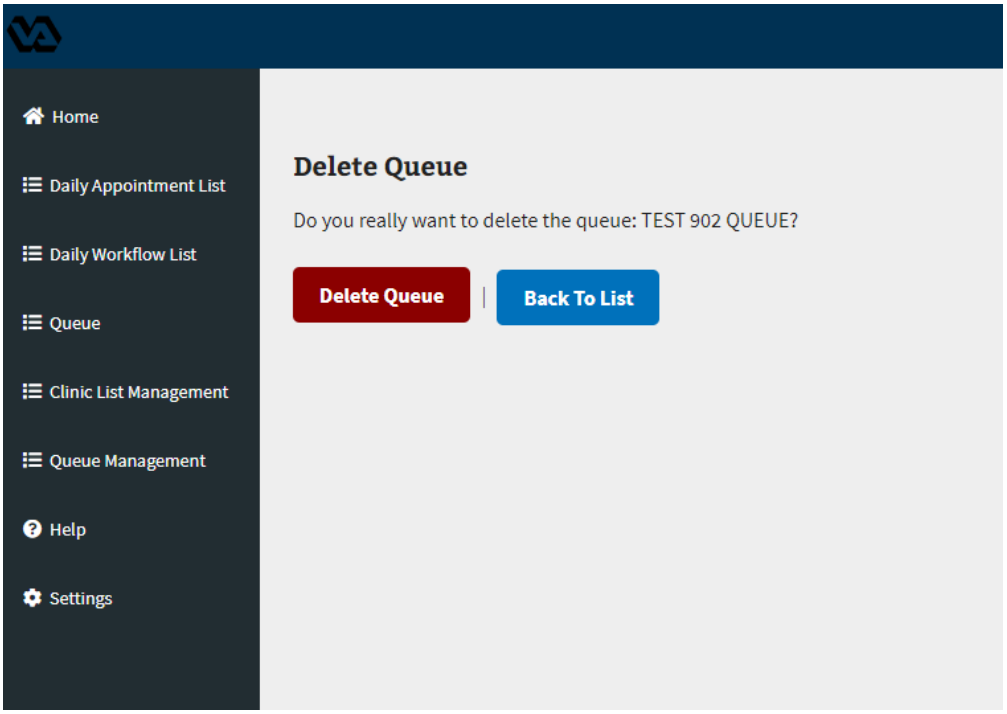


Figure 48: Delete Queue Pop-up.

Note: A queue can only be deleted if it does not have patients assigned to it, or if the patients that are assigned to the queue are all in a complete status. If a user attempts to delete a queue where these requirements are not met, they will receive the below notice.

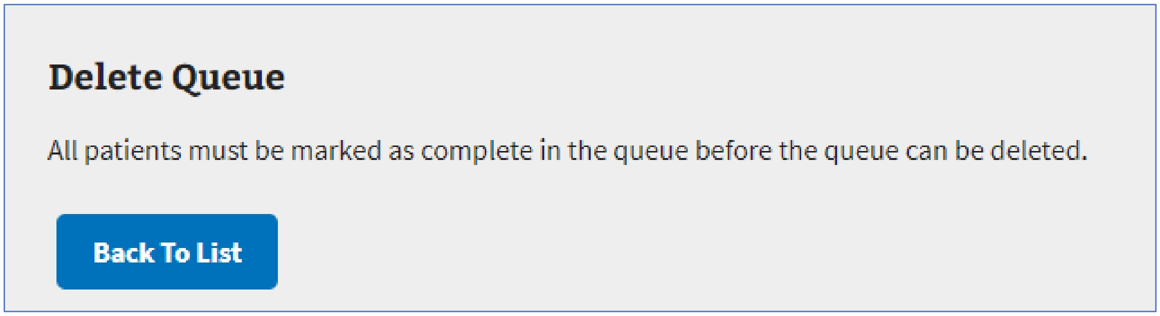


Figure 49: Delete Queue Pop-up if Requirements Not Met.

5.4.2 Utilizing Queues

All VSECS users have access to the Queue tab.

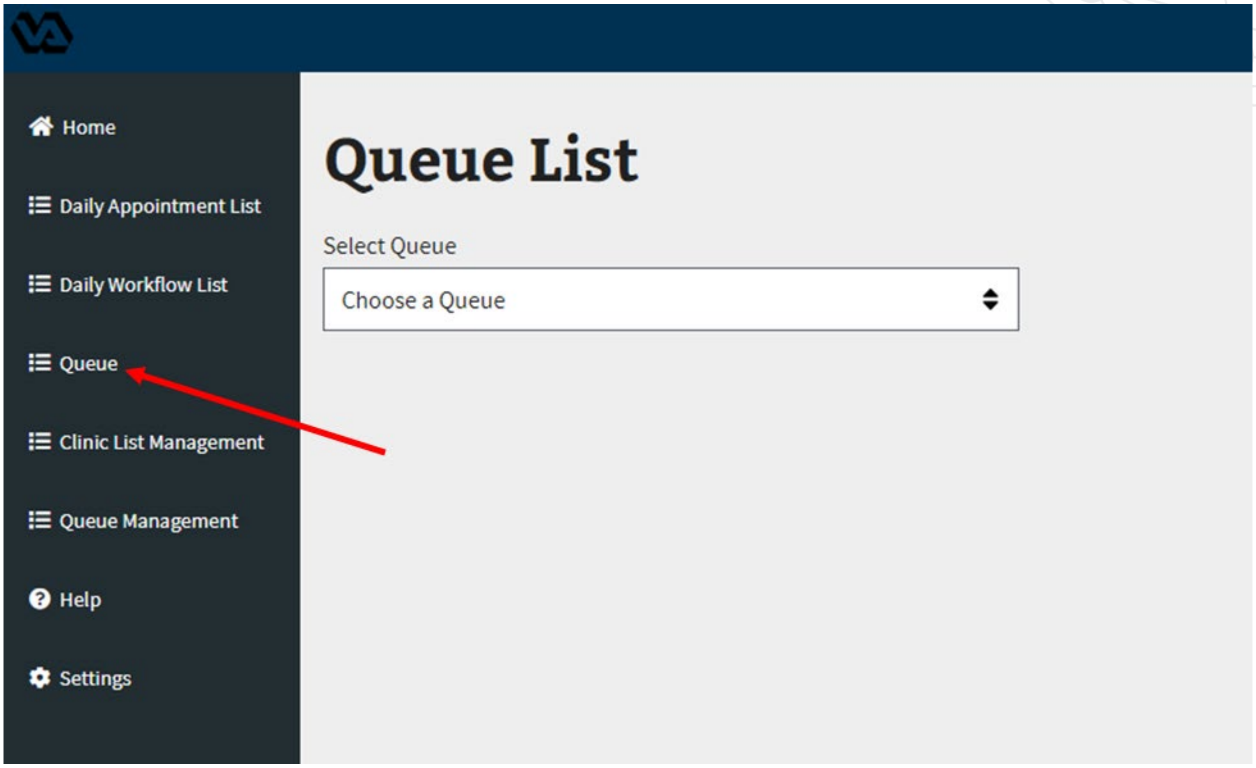
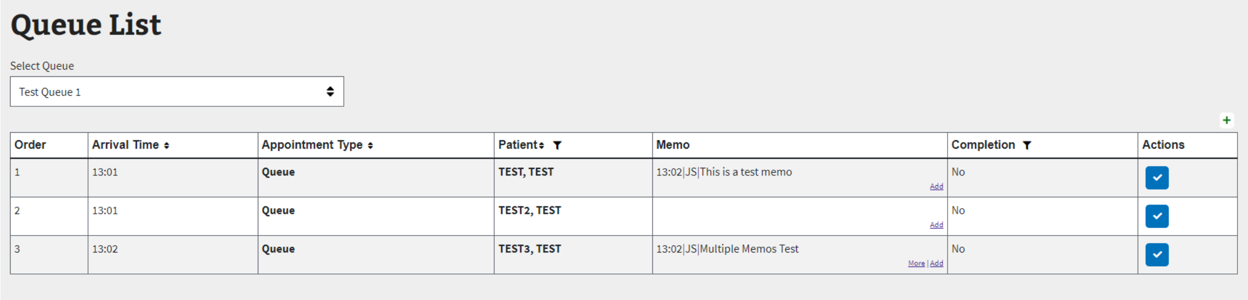


Figure 50: Queue List Page.

- From the Queue tab, select the applicable queue from the dropdown.
- Veterans in that Queue will appear.



Order	Arrival Time	Appointment Type	Patient	Memo	Completion	Actions
1	13:01	**Queue**	**TEST, TEST**	13:02|JS|This is a test memo Add	No	
2	13:01	**Queue**	**TEST2, TEST**	Add	No	
3	13:02	**Queue**	**TEST3, TEST**	13:02|JS|Multiple Memos Test More | Add	No	

Figure 51: Queue List Search Results.

- Users can select the check under Actions to mark the encounter as complete.

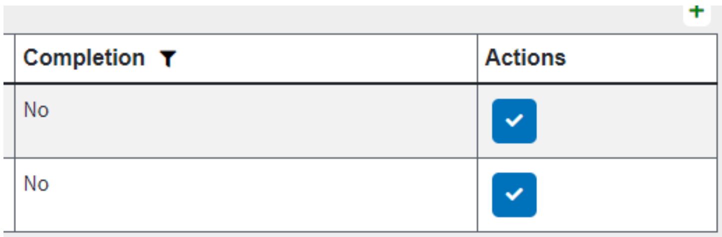


Figure 52: Action Items Check Icon.

- Once selected, the note under “Completion” will say “Yes,” and the check mark will be removed.

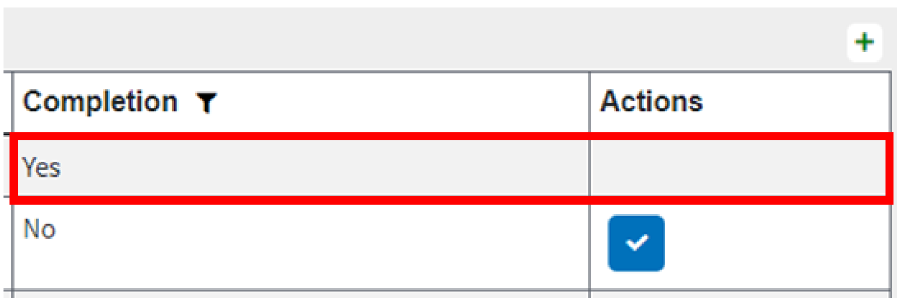


Figure 53: Completion Change.

Figure 54: Adding a Veteran to Queue.

- Use the Patient Search to add a Veteran who is already in the VA System.

Note: Users must have SECONDARY MENU OPTIONS: VIAB WEB SERVICES OPTION to utilize patient search.

- For Veterans not in the VA System, users can manually type the veterans name to add them to the queue.

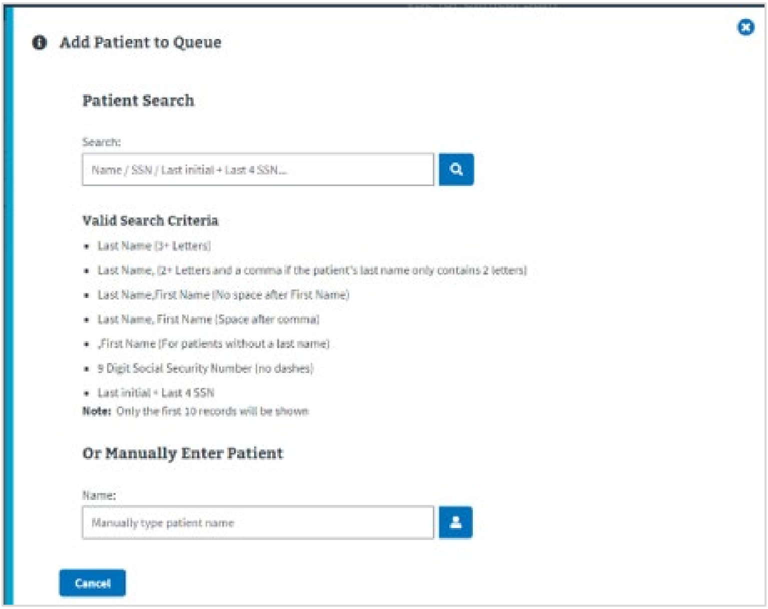


Figure 55: Patient Search Lookup.

- If manually entered, select the icon to the right of the text box to add the Veteran to the queue.

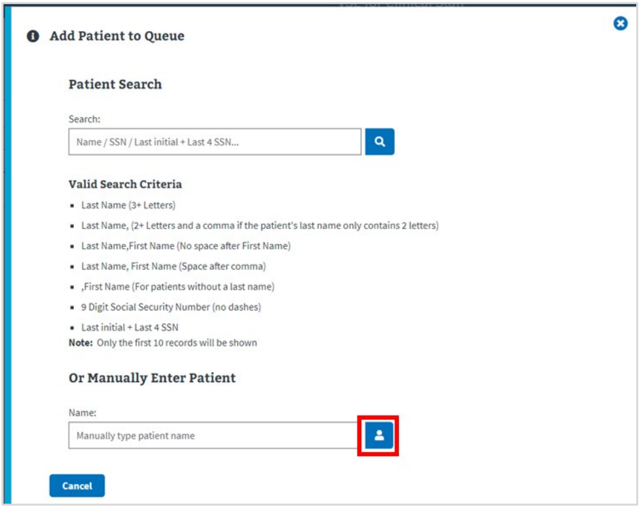


Figure 56: Manually Entering.

5.4.3 Queue List Memos

A column for memos has been added to the Queue List page. The memo functionality mirrors the memo functionality that is currently in production on the Daily Workflow List.

Users can select “Add” in the memo column of the patient they need to add a memo for. Once selected, the user will be presented with the below pop-up where they can type in the memo.

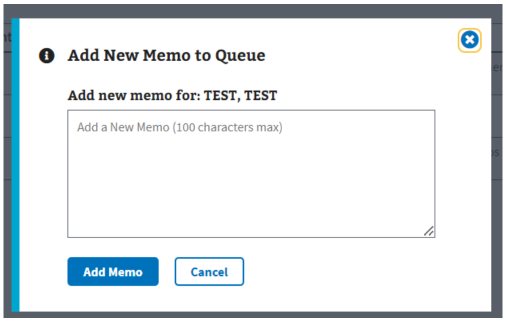


Figure 57: Add New Memo to Queue Pop-Up.

Select “Add Memo” and the page will refresh with the memo added.

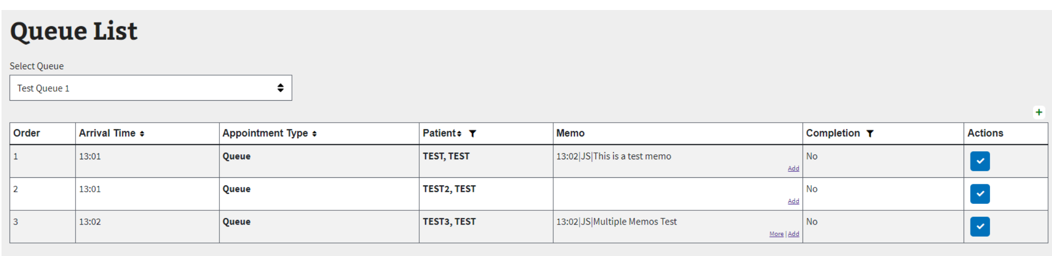


Figure 58: Queue List with added Memo Column.

If multiple memos are added to the same patient, the most recent memo will appear. However, there will be a “More” button. If a user needs to see all memos for a patient, they can select More, and the memos will display in a pop-up as shown below.

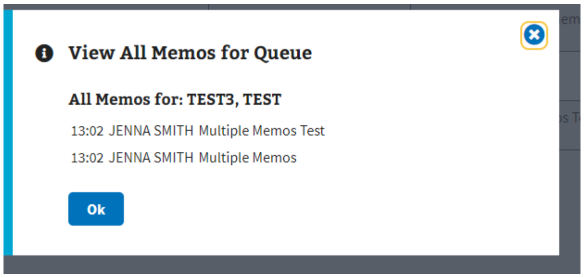


Figure 59: View All Memos for Queue Pop-Up.

5.5 Medications List and Pre-Visit Summary

5.5.1 Viewing Medications List

VSECS gives users the ability to view the list of medications associated with the patient. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To view the patient's Medications List:

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Medications button displayed on the left side of the Actions column.

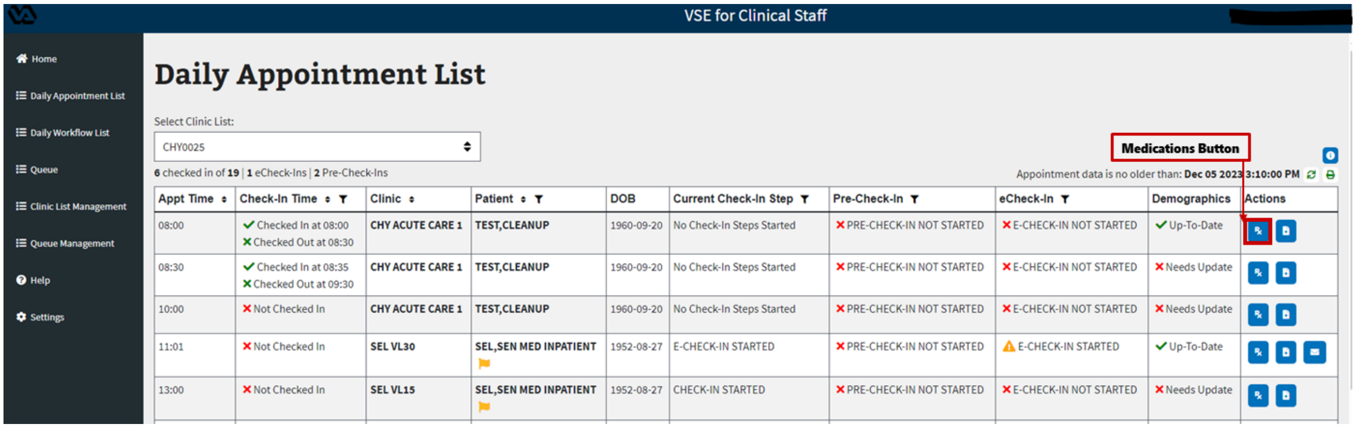


Figure 60: Medications Button.

2. If the record is sensitive, a Sensitive Record pop-up page displays asking if you want to proceed viewing the Medication List. Click "Yes" to view the Medications List record or click "No" to go back to the Daily Appointment or Workflow List.

Figure 61: Sensitive Record Pop-up Page.

3. The Medications List page displays with the list of the patient's medications.

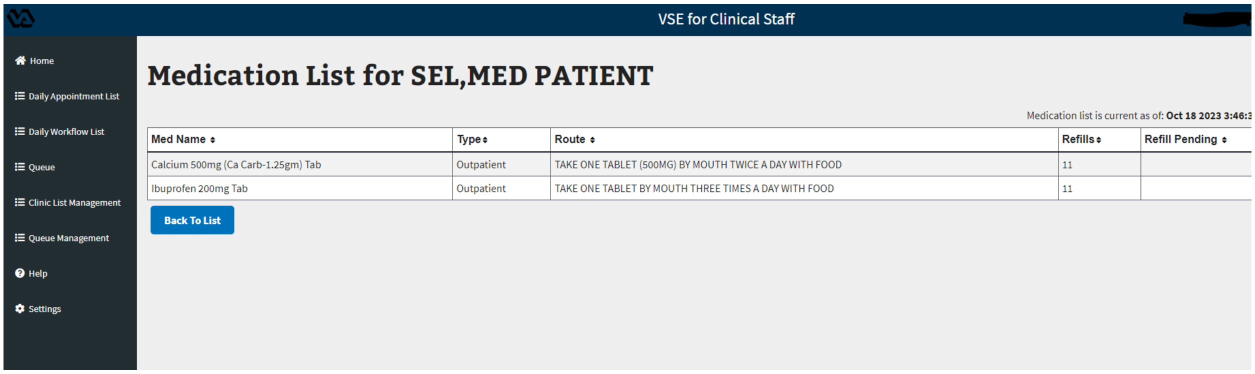


Figure 62: Medication List Page.

5.5.2 Printing Pre-Visit Summary

This VSECS functionality allows the staff members the ability to print or save PDF format of the Pre-Visit Summary for a patient to ensure patients are informed before their appointment. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To print/save the patient's Pre-Visit Summary,

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Pre-Visit Summary button displayed on the right side of the Actions column.

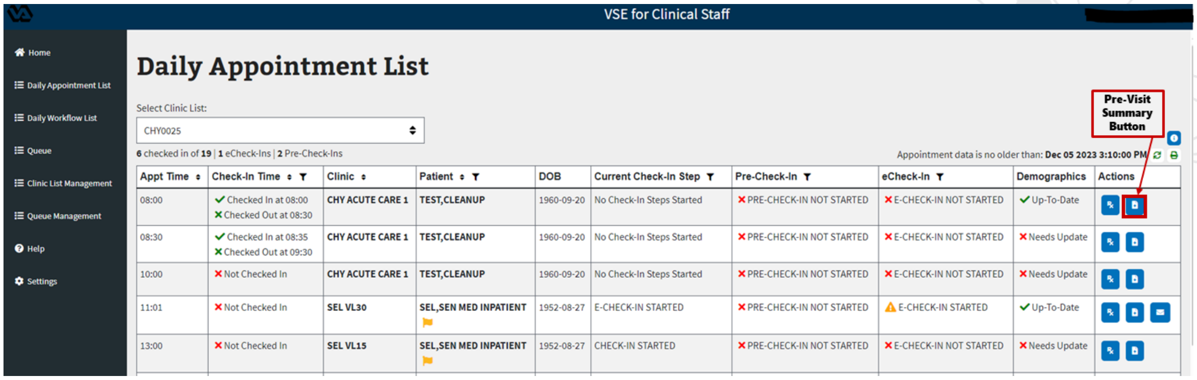


Figure 63: Pre-Visit Summary Button.

2. If the record is sensitive, a Sensitive Pre-Visit Summary Record pop-up page displays asking if you want to proceed viewing the Pre-Visit Summary record. Click “Yes” to view the Pre-Visit Summary record or click “No” to go back to the Daily Appointment or Workflow List.

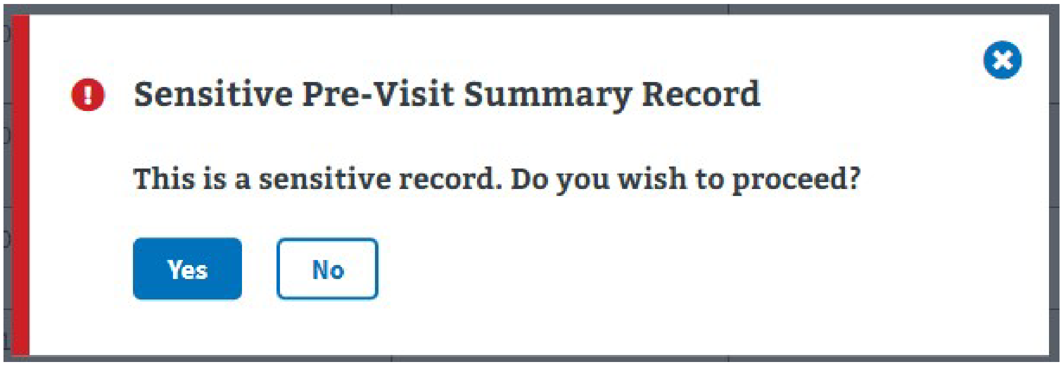
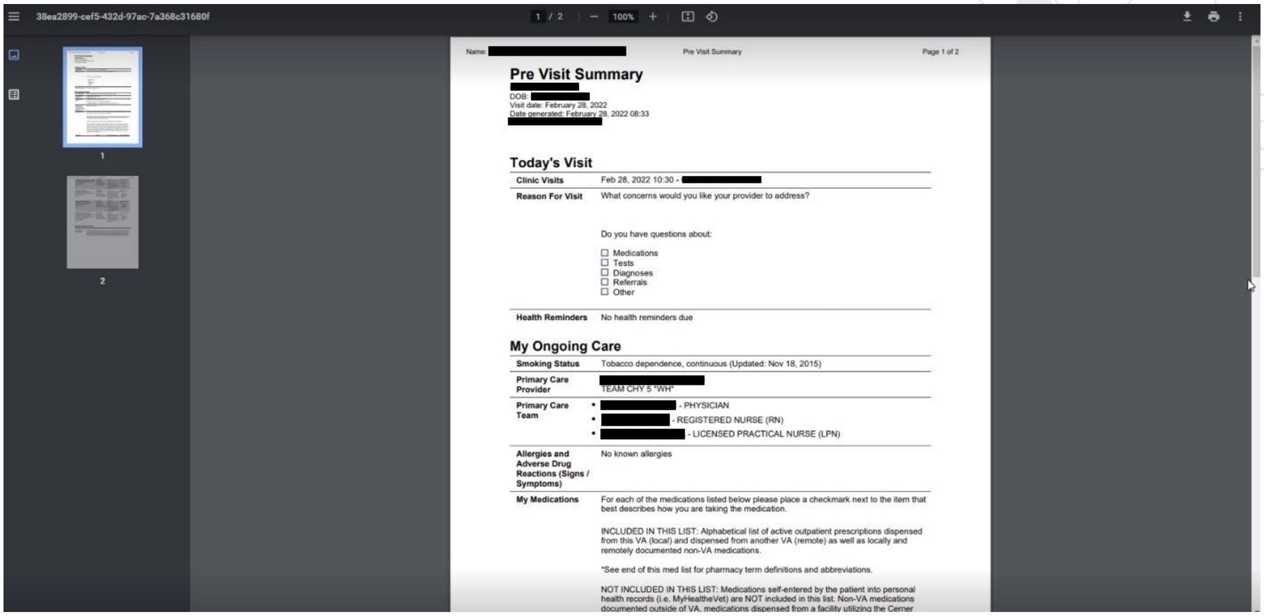


Figure 64: Sensitive Pre-Visit Summary Record Pop-up Page.

3. The Pre-Visit Summary Page displays on your default browser in a separate tab in PDF format where it can either be printed or saved.



Name: [redacted] Pre Visit Summary Page 1 of 2

Pre Visit Summary

[redacted]
DOB: [redacted]
Visit date: February 28, 2022
Date generated: February 28, 2022 08:33
[redacted]

Today's Visit

Clinic Visits	Feb 28, 2022 10:30 - [redacted]
Reason For Visit	What concerns would you like your provider to address? Do you have questions about: ☐ Medications ☐ Tests ☐ Diagnoses ☐ Referrals ☐ Other
Health Reminders	No health reminders due

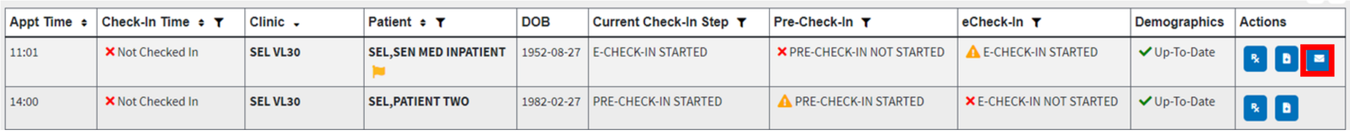
My Ongoing Care

Smoking Status	Tobacco dependence, continuous (Updated: Nov 18, 2015)
Primary Care Provider	[redacted] TEAM CHY 5 "WH"
Primary Care Team	• [redacted] - PHYSICIAN • [redacted] - REGISTERED NURSE (RN) • [redacted] - LICENSED PRACTICAL NURSE (LPN)
Allergies and Adverse Drug Reactions (Signs / Symptoms)	No known allergies
My Medications	For each of the medications listed below please place a checkmark next to the item that best describes how you are taking the medication. INCLUDED IN THIS LIST: Alphabetical list of active outpatient prescriptions dispensed from this VA (local) and dispensed from another VA (remote) as well as locally and remotely documented non-VA medications. *See end of this med list for pharmacy term definitions and abbreviations. NOT INCLUDED IN THIS LIST: Medications self-entered by the patient into personal health records (i.e. MyHealtheVet) are NOT included in this list. Non-VA medications documented outside of VA, medications dispensed from a facility utilizing the Cerner

Figure 65: Patient's Pre-Visit Summary.

5.6 Messaging

On the Daily Workflow and Daily Appointment lists, patients who have started the eCheck-in process meet the criteria for messaging and will have a message icon under the Action's column within their appointment row.



Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Step	Pre-Check-In	eCheck-In	Demographics	Actions
11:01	✕ Not Checked In	SEL VL30	SEL,SEN MED INPATIENT	1952-08-27	E-CHECK-IN STARTED	✕ PRE-CHECK-IN NOT STARTED	⚠ E-CHECK-IN STARTED	✓ Up-To-Date	
14:00	✕ Not Checked In	SEL VL30	SEL,PATIENT TWO	1982-02-27	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✕ E-CHECK-IN NOT STARTED	✓ Up-To-Date	

Figure 66: Image showing the added Message icon under the Action's column.

When the message icon is selected for an appointment, a messaging page will then load for the patient in context. The Messages page includes the option to send the patient a message and displays messages that have previously been sent.

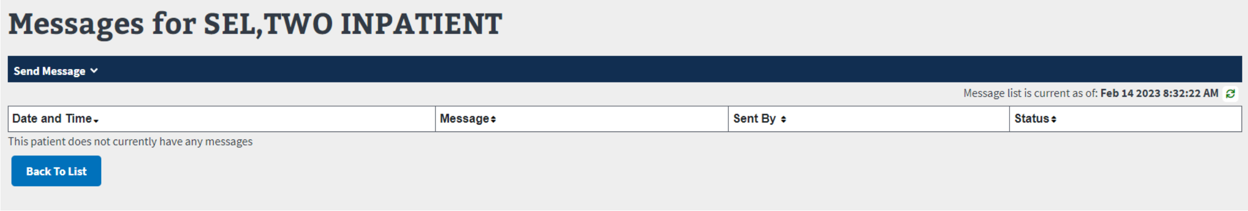


Figure 67: Message Page.

To send a message, the user will click the dropdown by Send Message. The dropdown will include two message types that can be sent to the patient: Check In Call Number or Check In Contact Attempt.

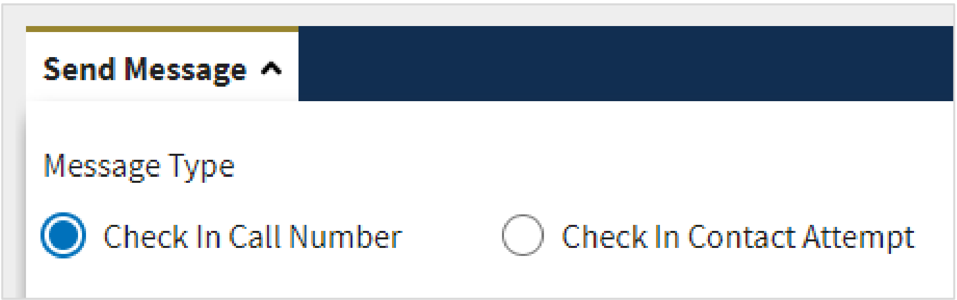


Figure 68: Send Message Dropdown showing Check In Call Number or Check In Contract Attempt.

Each message type has a text template pre-populated in the Standard Message field. Below is an example of the default message for each message type.

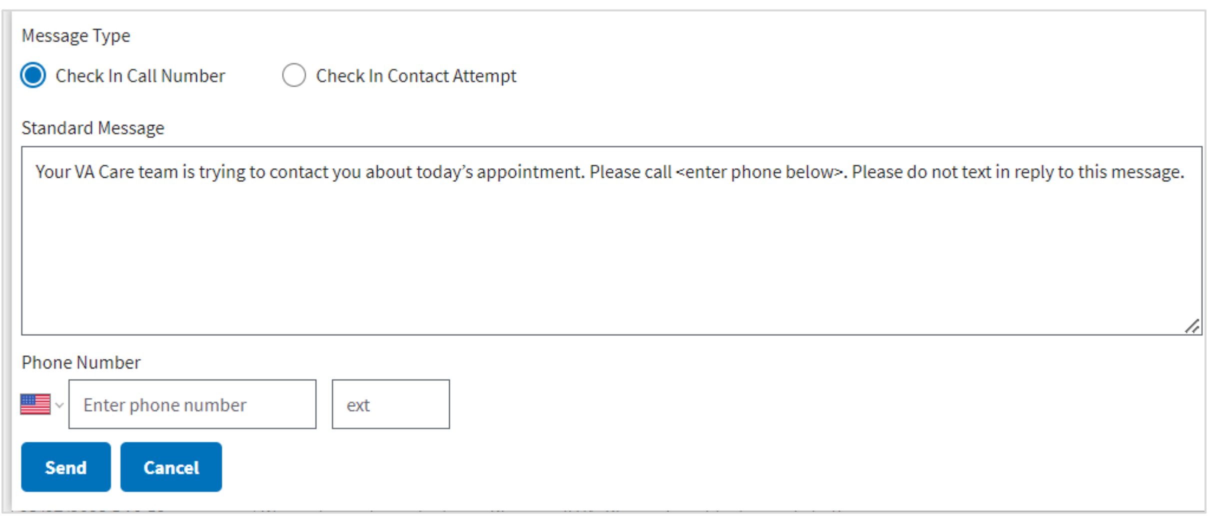


Figure 69: Check In Call Number with Default Message.

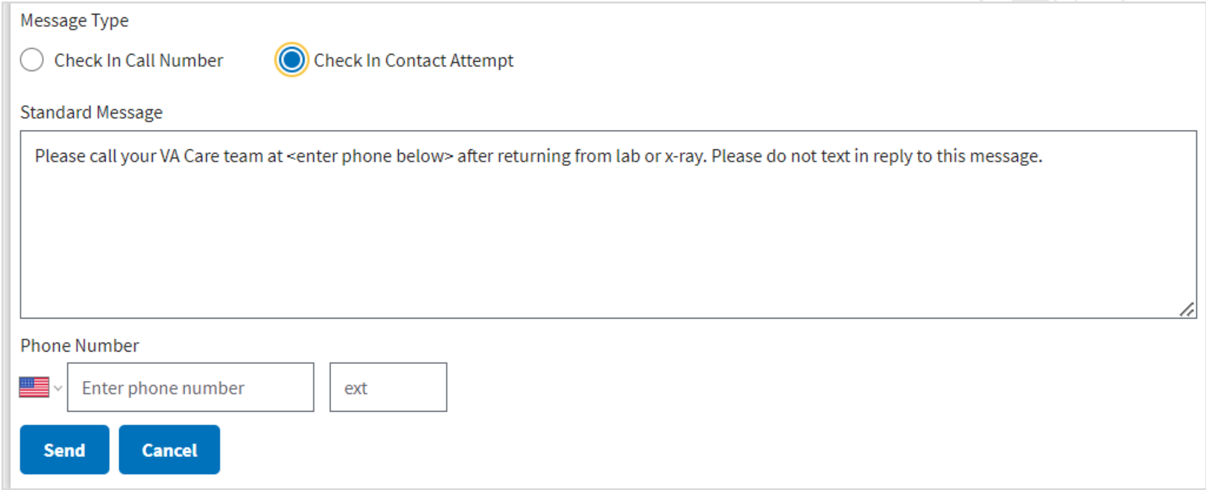


Figure 70: Check In Contact Attempt with Default Message.

The user will need to fill in the appropriate phone number in the Phone Number field under the Standard Message. This will insert the phone number into the text of the message. The standard message field cannot be edited.

The phone number field for Messaging includes a dropdown for country to account for international numbers.

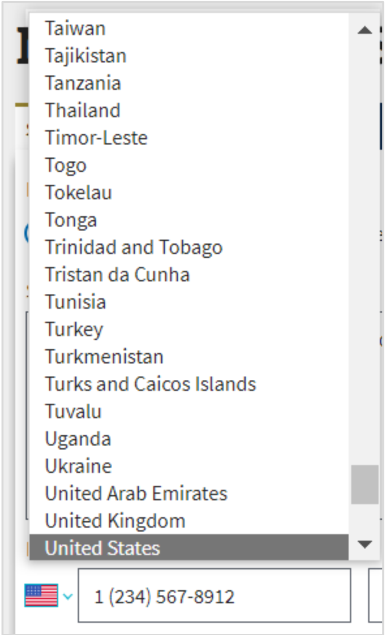


Figure 71: Image showing a dropdown for countries to account for international numbers.

The phone number field for Messaging also includes a field for extensions.

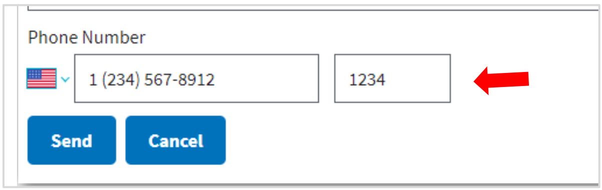


Figure 72: Image showing a field for phone number extensions.

Once the phone number has been entered in the phone number field, the user can hit the "Send" icon on the bottom left. The user will receive a confirmation pop-up when the message has been successfully sent.

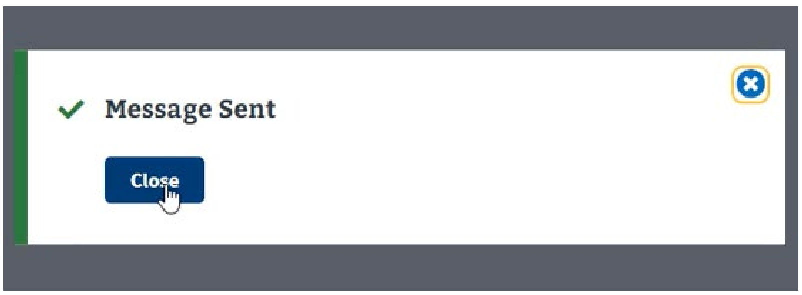


Figure 73: Confirmation Pop-up when the message has been successfully sent.

Once the message has been successfully sent, the Messages page will display the message details once refreshed.

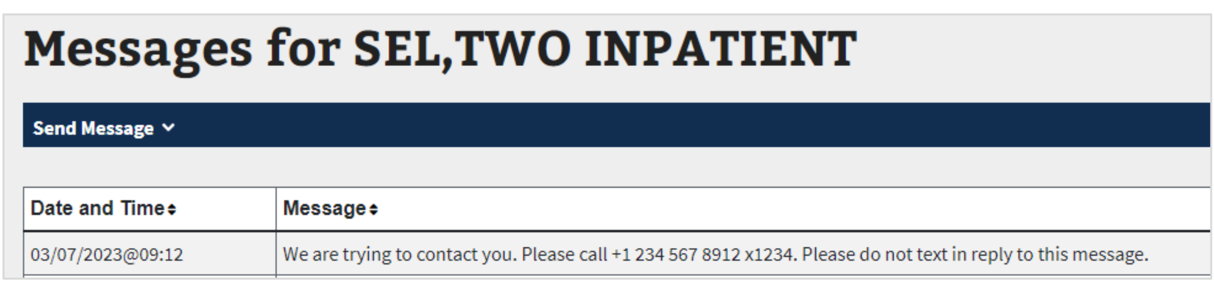


Figure 74: Messages Page displaying the message details once refreshed screenshot.

5.7 Fugitive Felon, National/Local, and Restricted Record Flags

Fugitive Felon, Local/National, and Restricted Record Flags will be displayed on Appointments in Daily Appointment List and Daily Workflow List. Hover your mouse over the flag icon below the patient's name to see the type of flag the icon represents or click on an information symbol located on the right-hand side of the Daily Appointment List and Daily Workflow List. When selected, a pop-up appears with legend information regarding the flags as shown below.

Figure 75: Information Icon to Display Flag Legend.

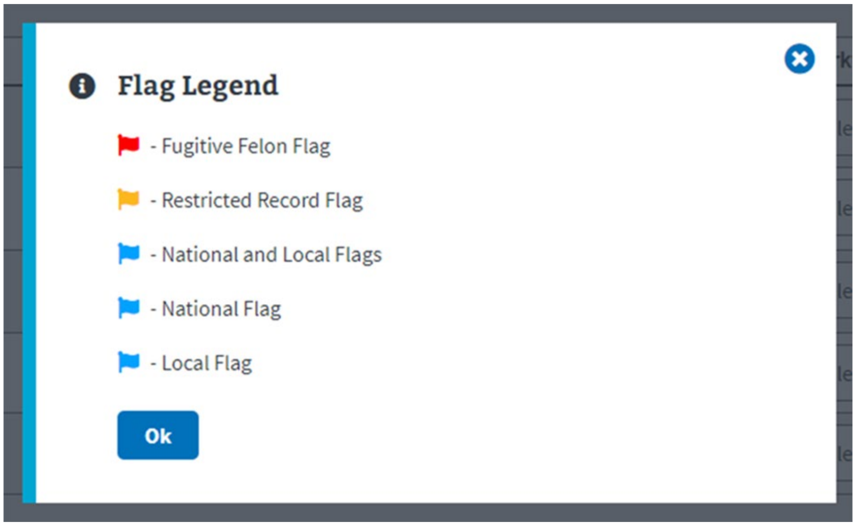


Figure 76: Flag Legend.

5.8 Displays Number of Checked-In Appointments, Count of eCheck-In Complete and Pre-Check-In Complete

The number of Checked-in appointments will now show on the Daily Appointment and Daily Workflow List, along with the count of eCheck-ins and Pre-Check-ins completed.

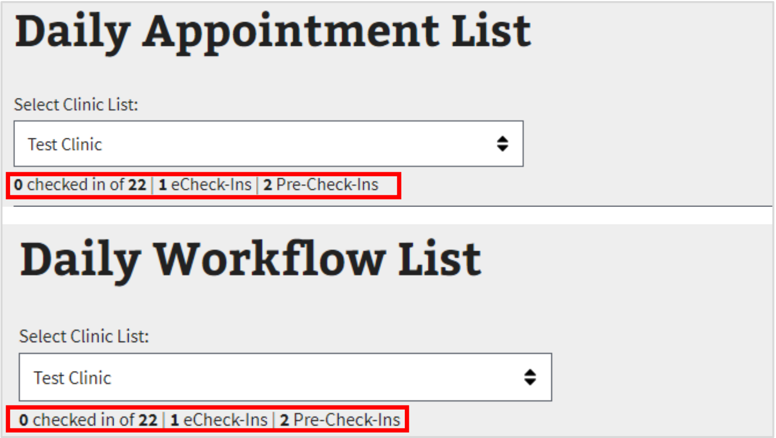


Figure 77: Checked-In Appointments, eCheck-In, and Pre-Check-In Completed Indicators.

5.9 Displays Checkout Time and Indicator

The Daily Appointment List and Daily Workflow List show if an appointment has been checked out and the time of check out.

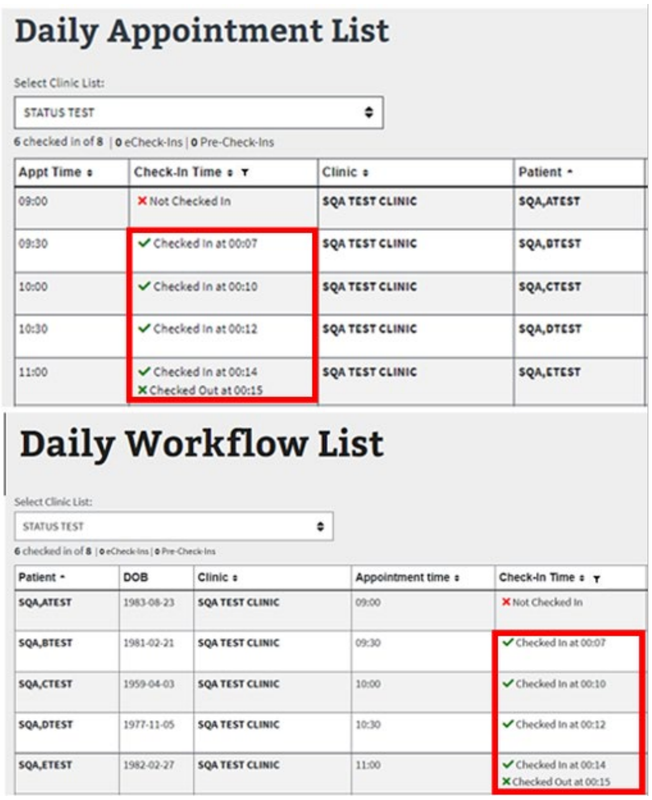


Figure 78: Check-out/Check-In Time and Indicators.

6 Troubleshooting/Help Section

For any VSECS-related issues, contact the Enterprise Service Desk (ESD) or create a ticket through ServiceNow (SNOW)/YourIT service portal and assign the ticket to the Scheduling Support assignment group.

6.1 Enhanced Error Messages

The error message logic and verbiage has been updated to provide more information for users on the issue and potential resolution, and to provide a link to a knowledge base article for further troubleshooting steps.

There are three different versions of the error message depending on the error received. The verbiage for each message is consistent with the exception of the service associated to the error, the error itself and the proper group to address in a YourIT ticket.

Below are the three services that can be associated with these errors and an example of the message format:

- VSE-CS
- IAM Service
- Local IT

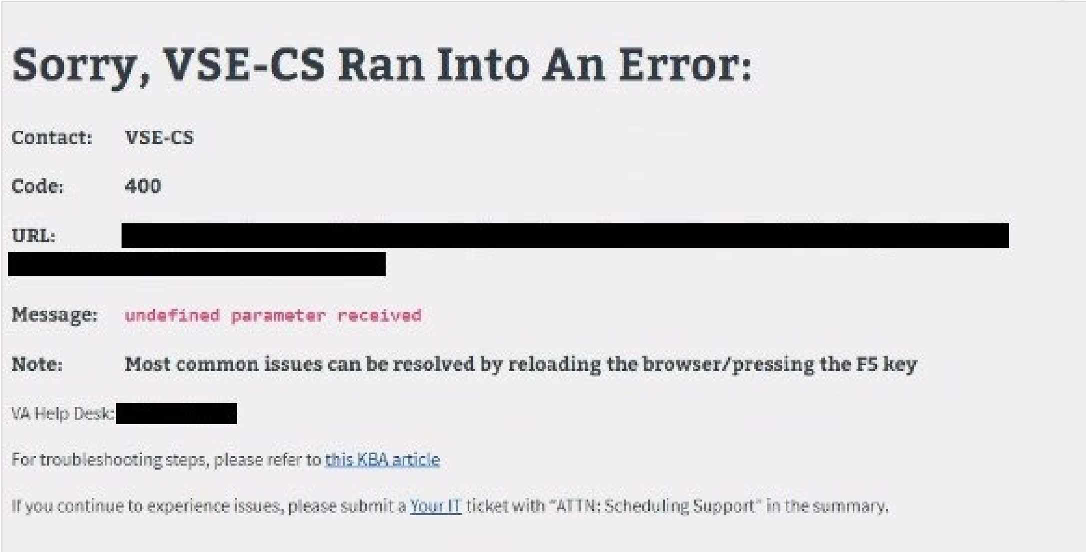


Figure 79: Enhanced Error Message.

6.2 Reset Button

The Help page now has a Reset Session button that will remove cached and stored data to help resolve errors.

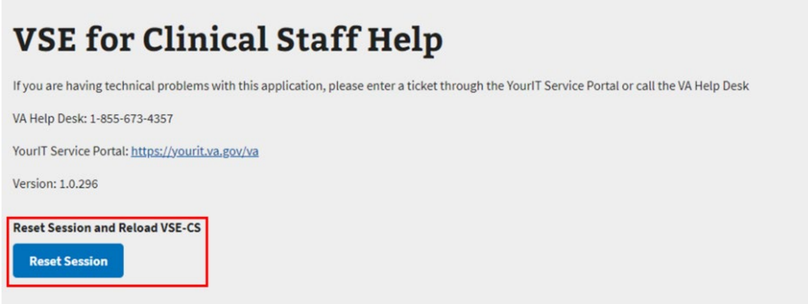


Figure 80: Reset Session and Reload VSECS.

6.3 Pop-up Message to Ensure Users are Running Current Version

If a user is not running the most current version of VSE-CS they will see the below notice. After selecting "Ok" the page will be refreshed and updated to the most current version.

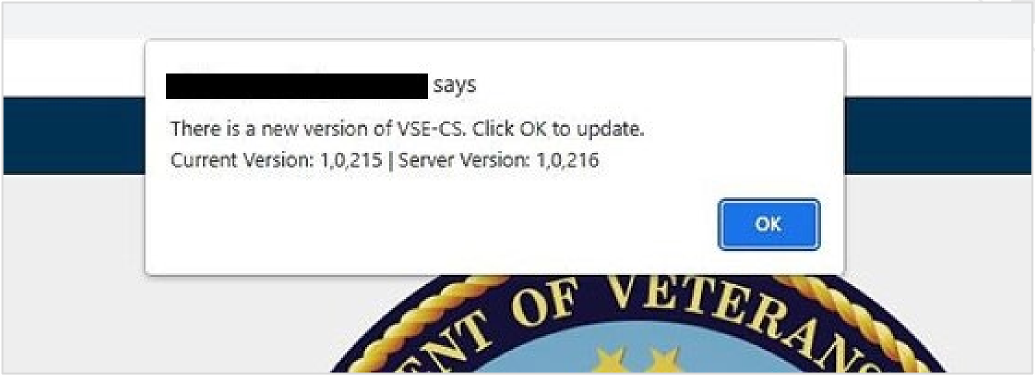


Figure 81: Pop-up Message informing users they are not running the latest version of VSECS.

6.4 System Notifications To Users

Users can see notifications pertaining to VSECS as they are in the web application. There are two types of notifications a user can see: Show Once or Offline.

6.4.1 Show Once

The show once notification will be used to keep users informed of information pertaining to VSECS that should not stop them from using the application. The message will display as below, and the user can select OK to continue using VSECS as normal. The message will only show once unless a user clears their local cache. In this case, it will show again.

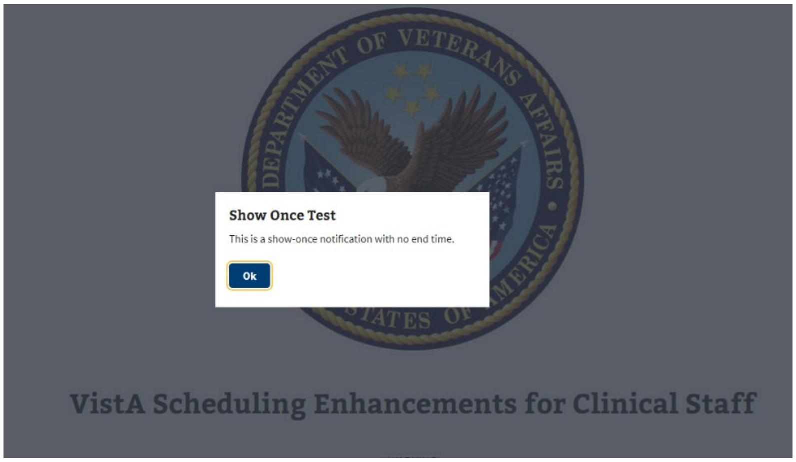


Figure 82: Image Displaying an Example of the Show Once Notification.

6.4.2 Offline

The offline notification will be used to inform users of a degradation or a different issue that has prompted VSECS to not be available. The offline notification is persistent and will not allow the user to click out of it. When the offline notification is showing, VSECS is not available to be used.

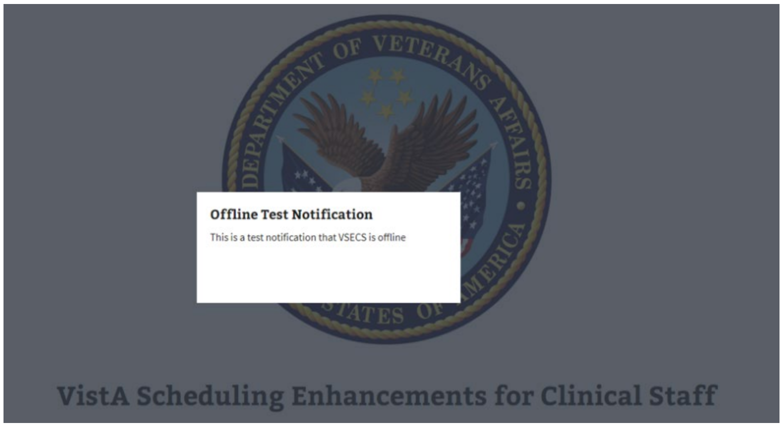


Figure 83: Image Displaying an Example of the Offline Notification.

7 Appendix

7.1 Appendix A - Acronyms and Abbreviations

Term	Description
IAM	Identity and Access Management
PIV	Personal Identity Verification
SSOi	Single Sign-On Internal
VA	Department of Veterans Affairs
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VS	VistA Scheduling
VSE	VistA Scheduling Enhancements
VSECS	VistA Scheduling Enhancements for Clinical Staff